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University of California
College of Agriculture
Agricultural Experiment Station
Berkeley, California

ECONOMIC SITUATION AND MARKET ORGANIZATION IN THE CALIFORNIA GRAPE INDUSTRIES

by

George L. Mehren

and

Grape Industry Statistics
Appendix C

Compiled by
S. W. Shear

May, 1950

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Foreword

This report has a single major purpose -- to describe the economic base of the California grape industries and the programs which have been developed by growers, handlers and processors. The text is divided into three sections dealing with the main trends in the grape industries and the wine industries and with the industry organizations for support, control or trade promotion. There are four appendices for reference. Appendix A contains charts supporting the conclusions of Section I of the text. Appendix B contains nineteen maps indicating the geographic distribution of production and processing in California. Appendix C, which was compiled almost in entirety by S. W. Shear of the Giannini Foundation, is a tabular description of all segments of the industry. Appendix D contains summaries of the laws, the orders and programs through which the industries have attempted to stabilize income from grapes.

The contribution of Dr. Shear in tabulating much of the statistical data used in this report is gratefully acknowledged.

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Compiled by
S. W. Shear

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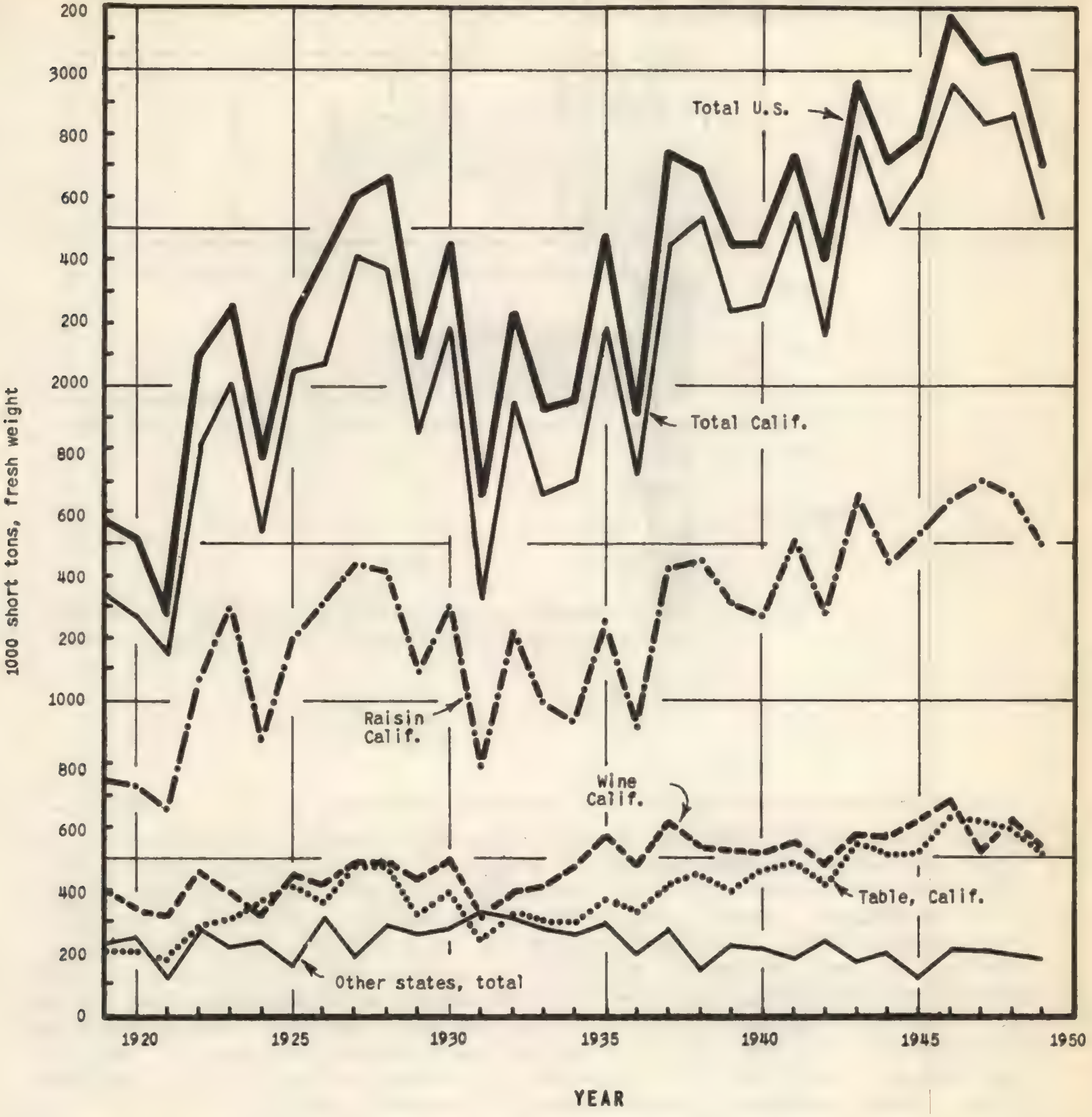
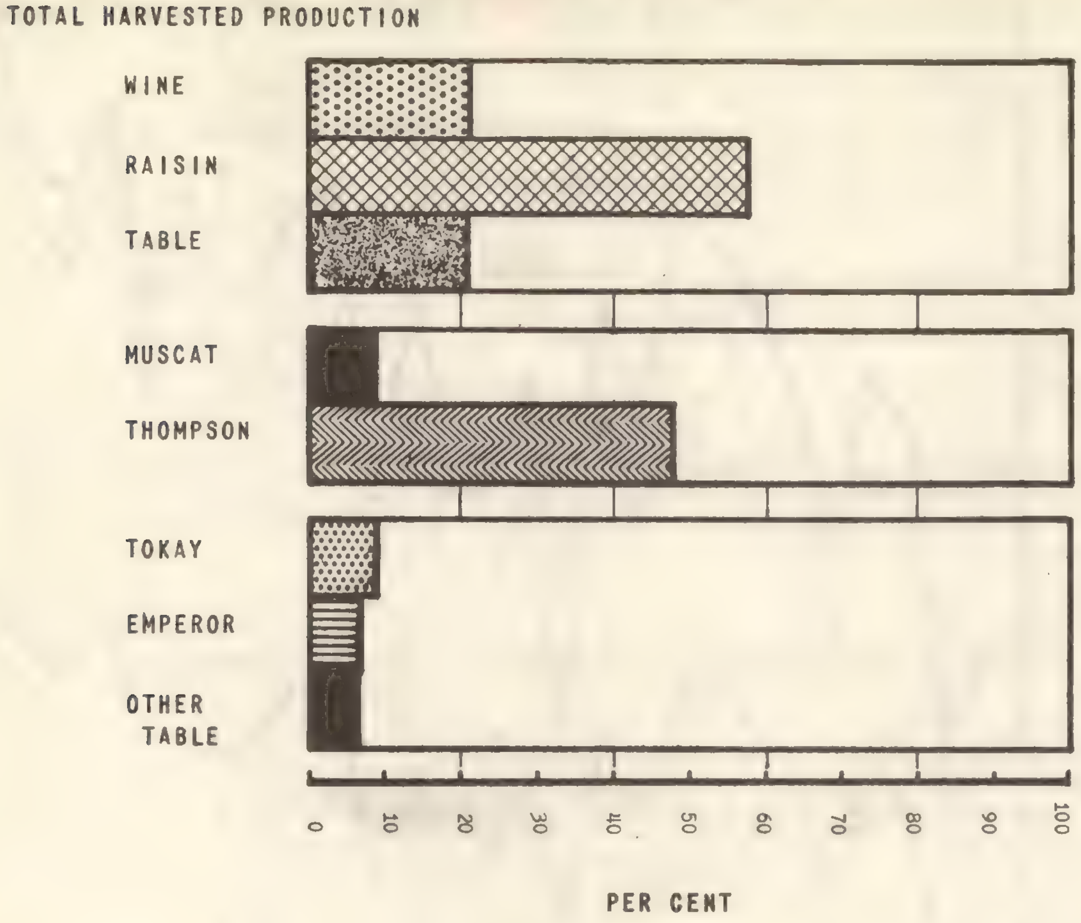
I. ECONOMIC SITUATION

Fig. 1. Grape Production in California and the United States, 1919-1949



PRODUCTION: Figure 1 shows most of the important economic characteristics of the grape industries of California. Note first that from the depression year of 1931 to the first post-war year of 1946, total annual United States production almost doubled. This rise from a total output of less than 1,700,000 tons to more than 3,100,000 tons per year means on the average about 200,000 tons more grapes each year. Note also that for all practical purposes the California industry is the national industry. Production in other states has slowly declined to about 200,000 tons per year from a 1931 high of about 300,000 tons. The figure also demonstrates that through this whole period, raisin-type grapes have comprised well over one-half of total production. Production of table-variety grapes has accelerated faster than output of wine grapes and now each type accounts for about twenty per cent of all California grapes. This steady increase

Fig. 2. Varietal Sources of Total Harvested Production of California Grapes, 1945-1948.



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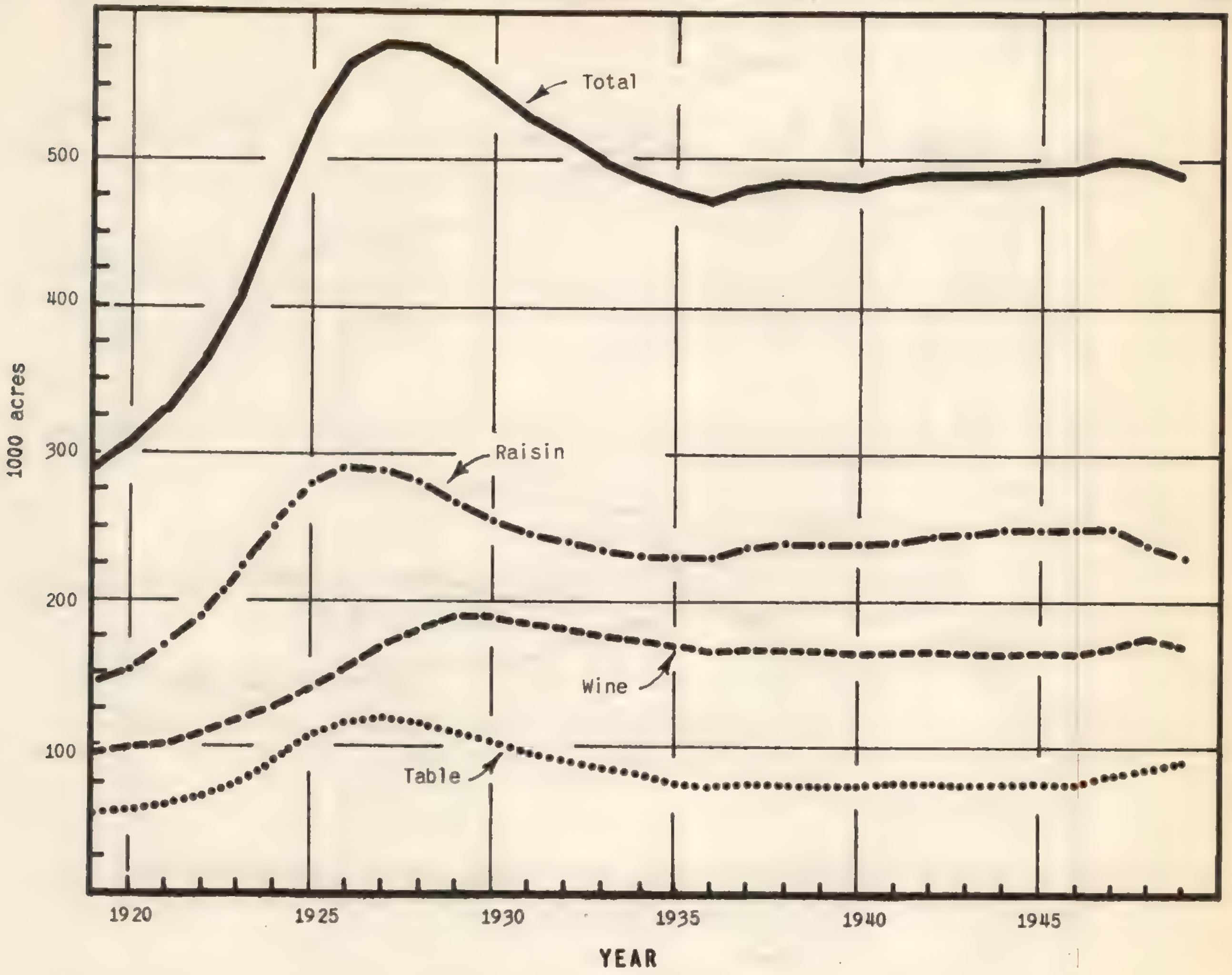
in production in all branches has out-raced both the rate of increase in population and in per capita consumption of grapes and grape products. Figure 1 also shows the second major problem facing these industries which use grapes as raw materials. Annual average output has increased steadily in a clear straight-line trend, but around this trend are violent annual fluctuations both up and down. These changes in yearly output have exceeded 800,000 tons. They cannot be foreseen in advance. They cannot be controlled. They are not correlated with annual changes in purchasing power or with other market-demand determinants. In tons, the greatest change in output from year to year is in raisin-type grapes, but in percentages the changes are not greatly different among varietal classes. Thus the grape industries must first adjust to a steady long-run expansion of production which necessitates continuous expansion of markets. Second, they must have a marketing mechanism sufficiently flexible to handle a total output which may be 1,900,000 tons as in 1936 and next year explode to 2,700,000 as in 1937. When this happens, prices for grapes used in all outlets may break drastically. For, third, in this single fruit industry in which total production always finds a home — the varietal classes may be used in several channels. Wine grapes go only for wine but if wine-grape production is heavy, part of the traditional winery market for table and raisin varieties is closed off and table and raisin grape prices fall. If raisin-type grapes are unusually heavy in output, they may flow over into table and vintner markets. High output or low markets for any varietal class transfers almost its full impact to the other two groups. Prosperity and depression in one part of the grape industry means prosperity or depression respectively in all parts.

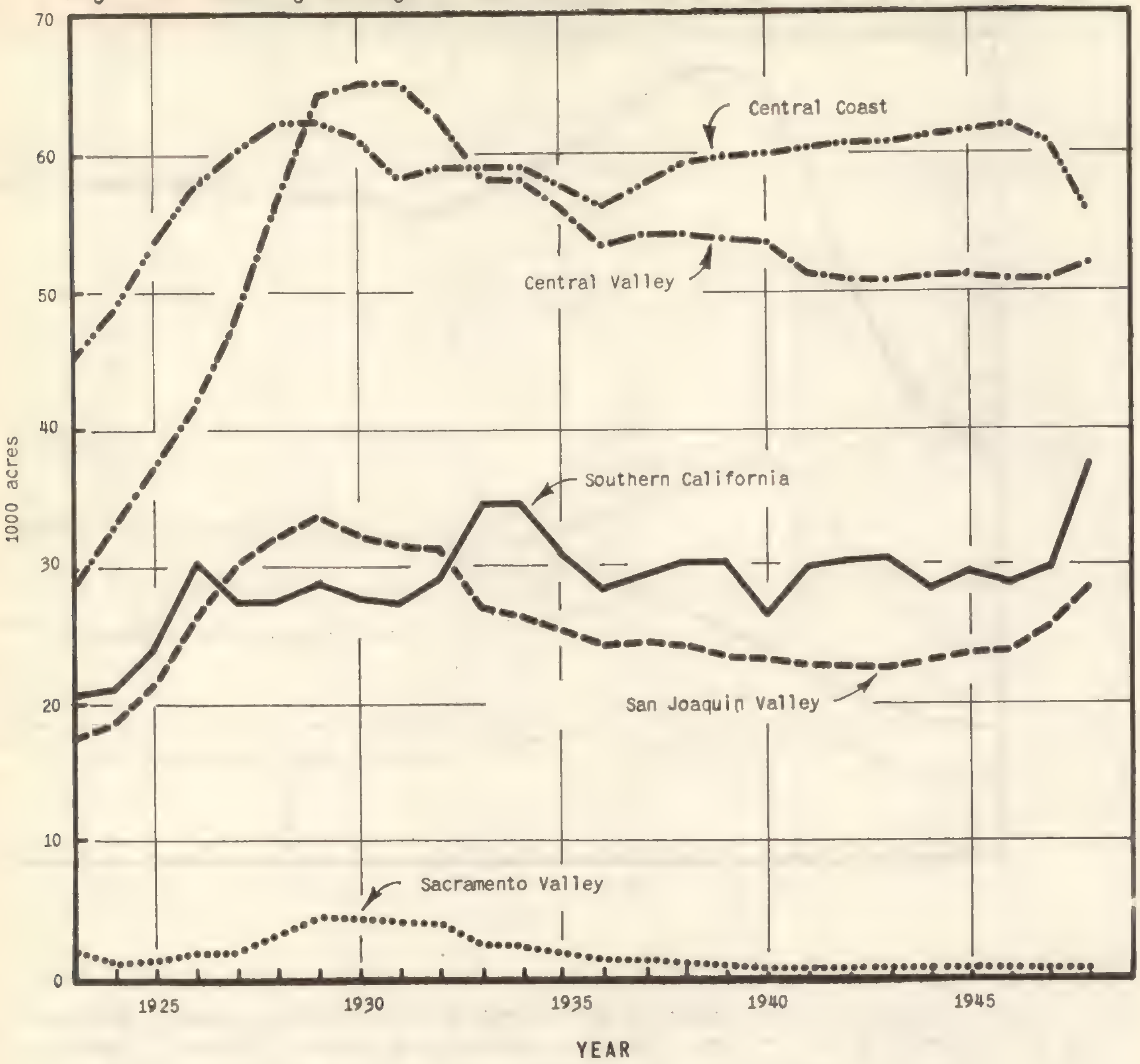
Fig. 3. Bearing Acreage of California Grapes by Varietal Classes, 1919-1949



The steady long-run expansion of output and the erratic annual changes both can be due only to one of two factors; acreage and yield. However, condition may best be considered apart from yield because it reflects weather in the main, while yield changes seem to reflect steadily improved culture.

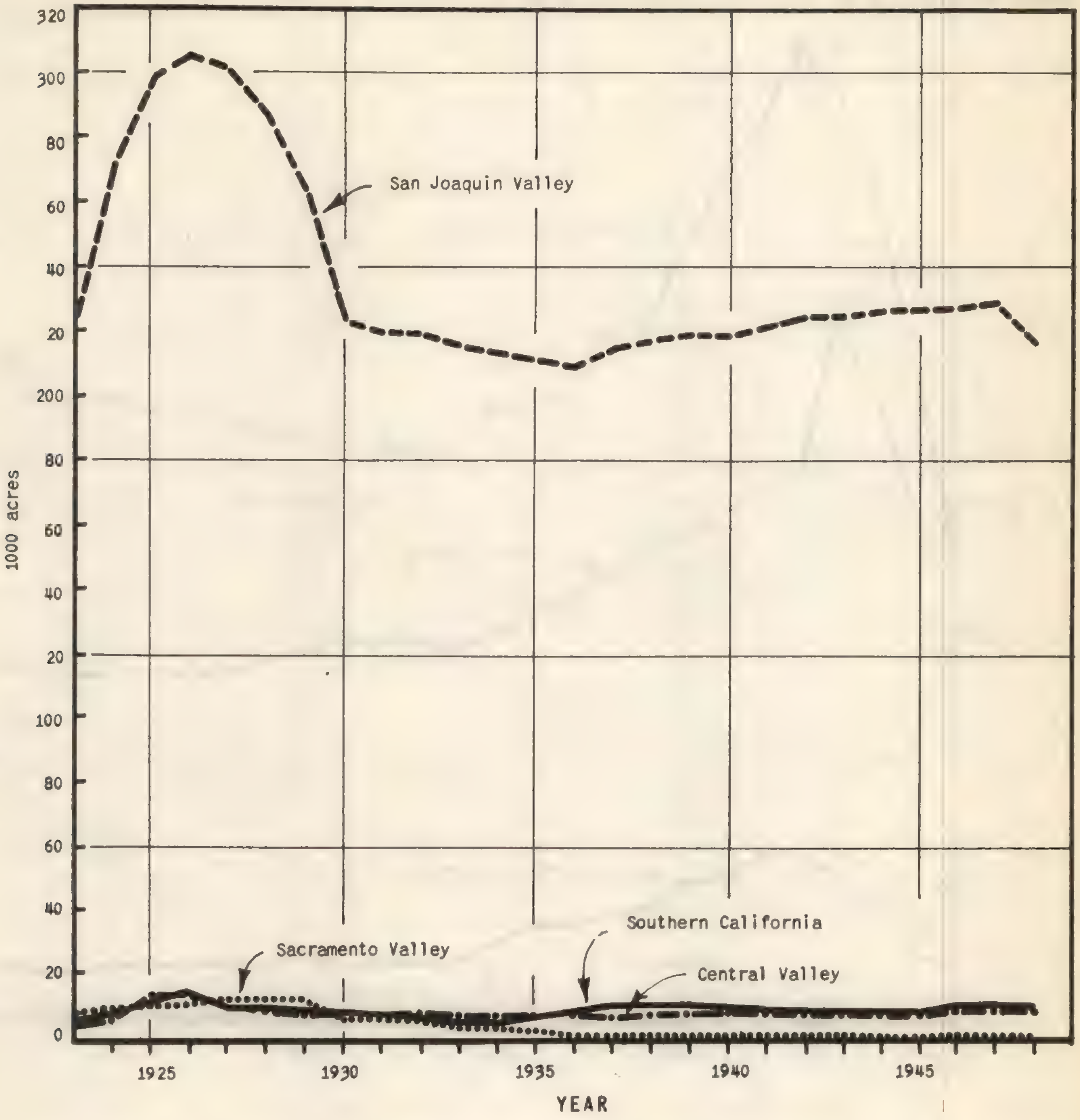
ACREAGE: The third chart makes clear beyond doubt that acreage-changes in any of the three varietal classes is not responsible either for the continuous expansion or the wide annual shifts in grape production. There has been a very small increase in bearing acreage in all three varietal classes since 1931. Their aggregate effect has been so little that it is not far wrong to assert that acreage in all classes has for all practical purposes been constant. Thus production must have climbed over the years and shifted so widely from year to year largely because of changes in yields per acre. The stability of bearing acreage in total and by varietal class is largely due to the same stability over the years when acreage is considered by district or by varieties within each broad varietal class. Once the boom of the late 1920's had passed, the grape industries settled down into an acreage pattern much like the present.

Fig. 4. Bearing Acreage of California Wine Grapes by Districts, 1923-1948



The geographic distribution of grape-production is indicated in several text charts. It is further shown in Appendix A, in which the first fifteen charts relate to acreage, and in Appendix B, where a series of maps is included. The state is divided into several districts in considering acreage, yield, production and utilization of the different classes of grapes and their products. The San Joaquin Valley District -- which dominates both wine and grape production -- includes the counties of Merced, Madera, Fresno, Kings, Tulare and Kern. The Central Valley District comprises the counties of Sacramento, San Joaquin, Stanislaus, Calaveras, Tuolomne and Amador. The Sacramento Valley District takes in the counties of Shasta, Siskiyou, Tehama, Glenn, Butte, Colusa, Sutter, Yolo, Yuba, Nevada, Placer and El Dorado -- although production has fallen to zero in some of these counties. These three districts together are called the Interior Valley in this report. The Southern California District includes the eight counties which lie south of the Tehachapi Mountains. The Central Coast is divided into two sub-districts. The North Bay is comprised of Humboldt, Mendocino, Lake, Sonoma, Solano, Napa and Marin counties. The South Bay includes Contra Costa, Alameda, Santa Clara, San Benito, San Francisco, San Mateo, Santa Cruz, Monterey and San Luis Obispo counties.

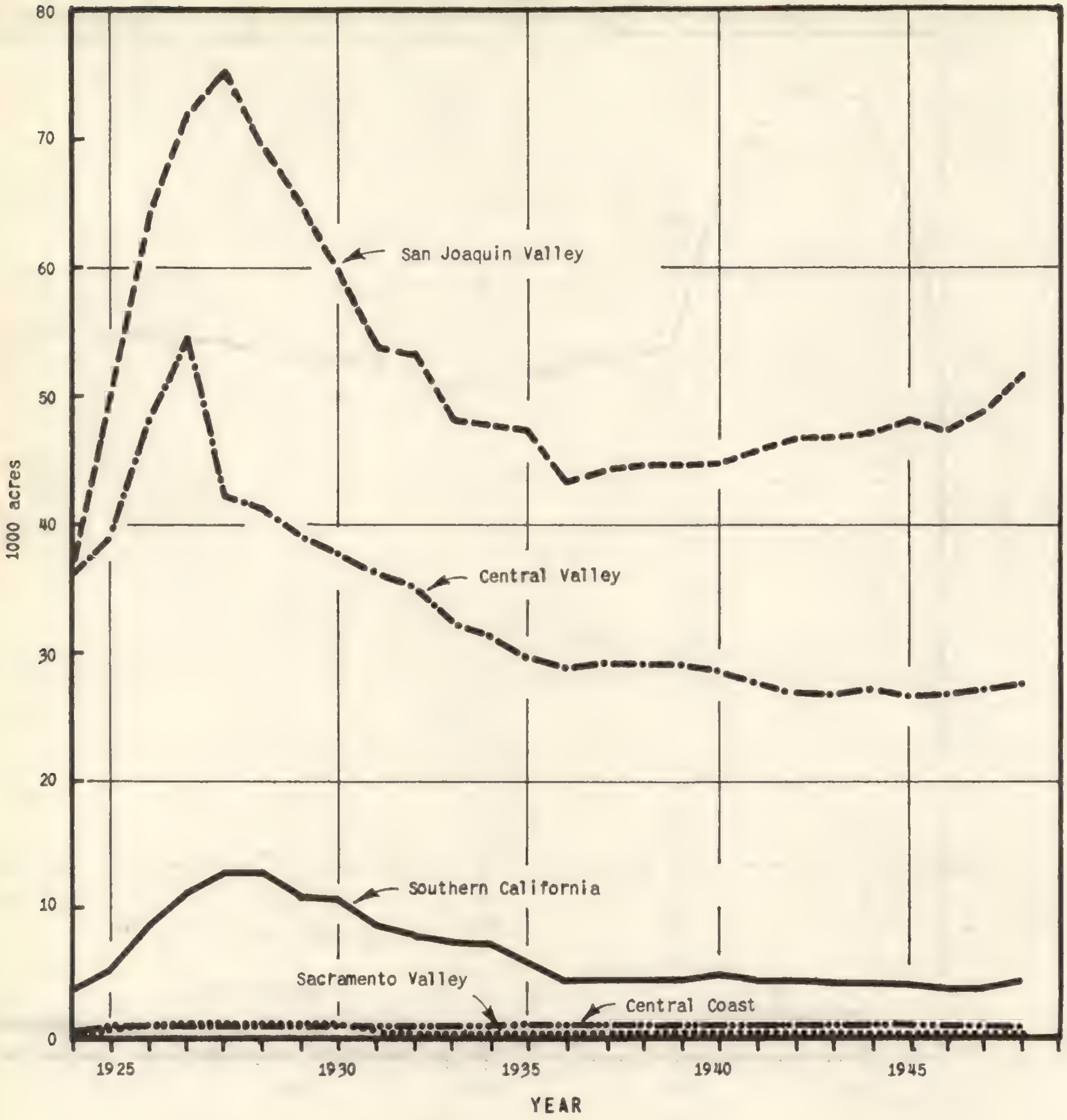
Fig. 5. Bearing Acreage of California Raisin Grape Varieties by Districts, 1923-1949



Changes in bearing acreages of wine grapes in the several districts have been minor in recent years. Some apparent changes are probably due to changes in methods of reporting acreage. The Central Coast District is the major wine grape area, but the Central Valley and the San Joaquin Districts together have for many years held about sixty per cent of all the wine-grape acreage in the state. Southern California has maintained an almost constant acreage at around 30,000. The Sacramento Valley District, which was never important, has almost disappeared from the industry.

The San Joaquin Valley District is the heart of the raisin areas. No other district is of real importance. There have been no major changes in the last two decades in total bearing acreage of the raisin varieties.

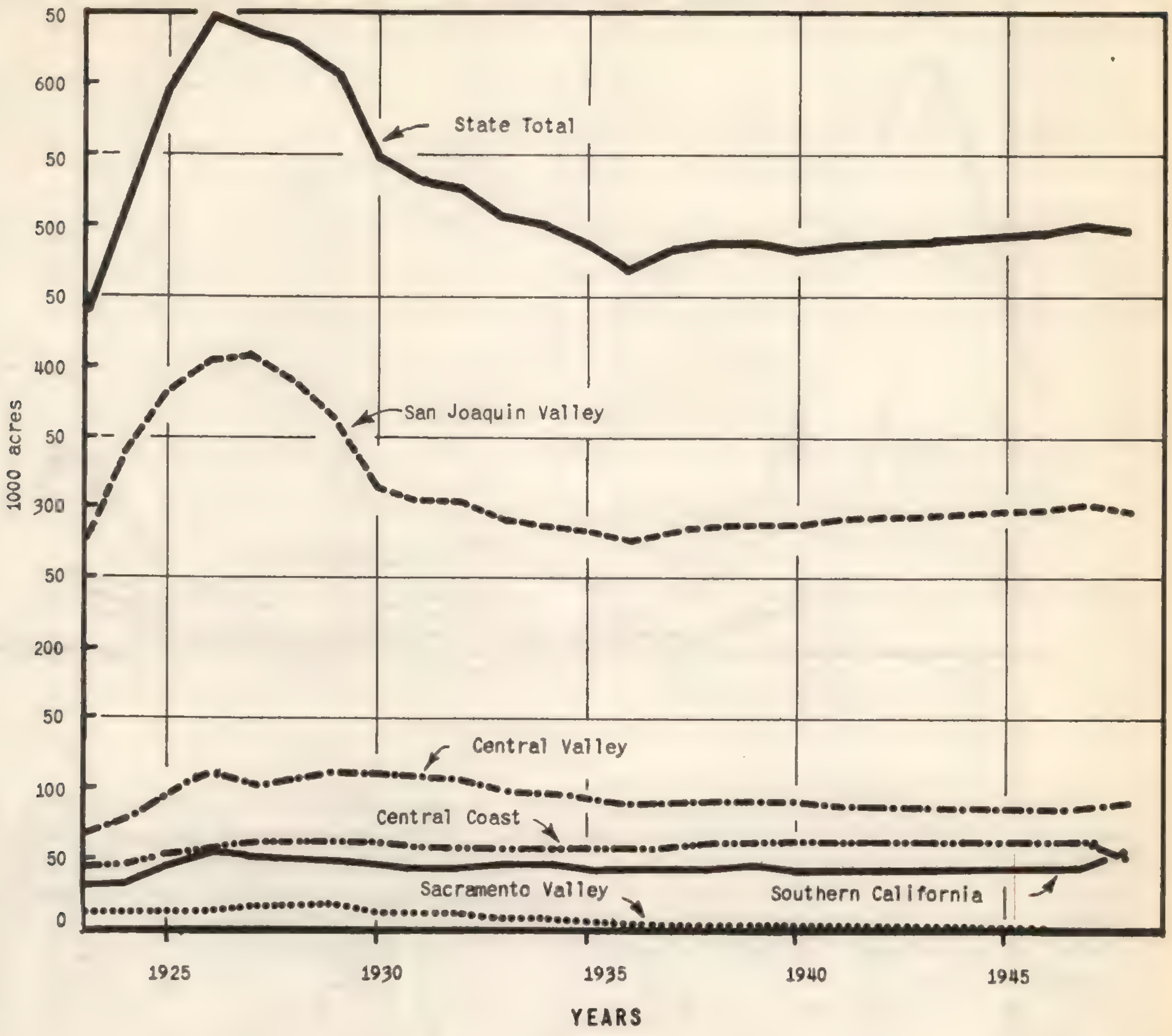
Fig. 6. Bearing Acreage of California Table Grapes by Districts
1923 - 1948



Bearing acreage of table-variety grapes is concentrated in the Interior Valley, with the San Joaquin District dominating. The increase in recent years in this region has about balanced the decrease in acreage in the Central Valley. Other districts appear to be retaining the very minor acreage they have long contained. In total, acreage is quite constant. The increased annual output of table grapes apparent in Figure 1 must therefore also be due to an increased yield per acre over the past two decades.

When bearing acreage of all varieties is aggregated for the several districts, as is shown in Figure 7, several striking facts appear. The San Joaquin Valley is far and away the major district. This dominance is overwhelming when the acreage

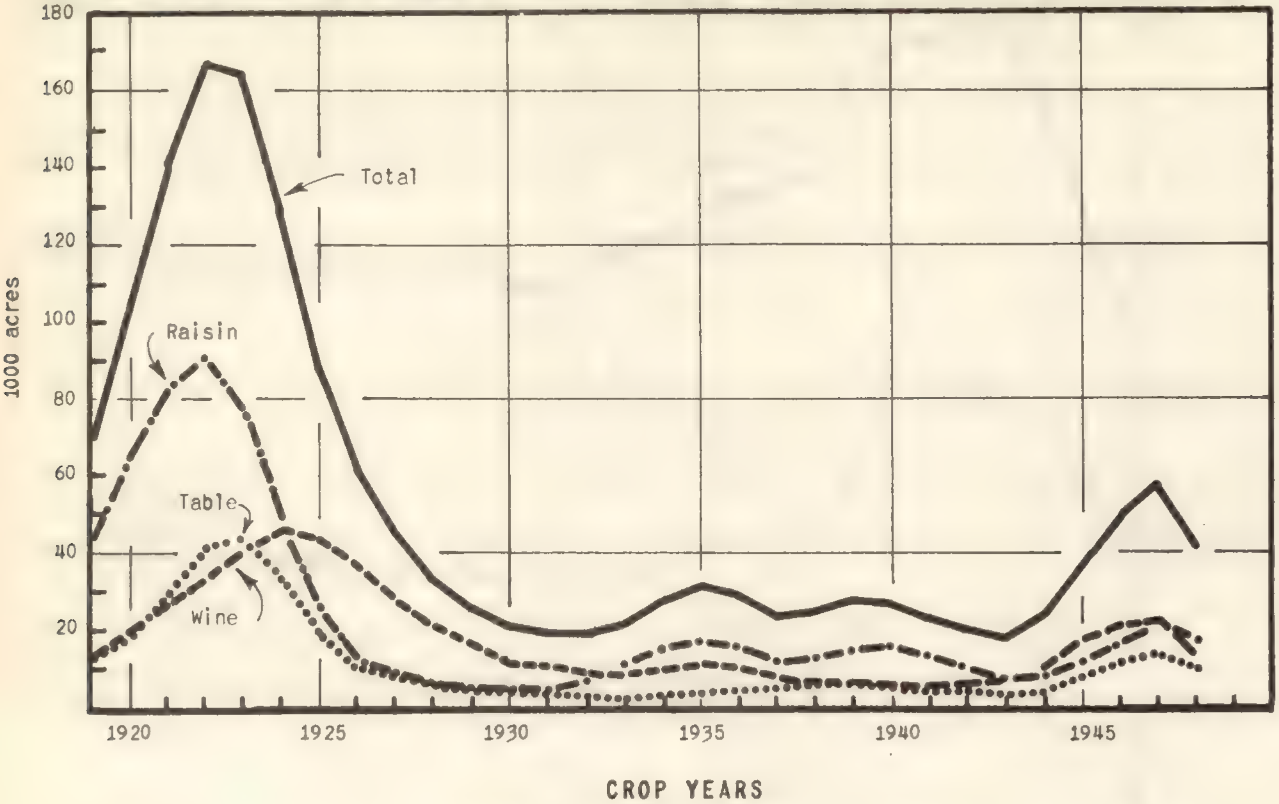
Fig. 7. Bearing Acreage of California Grapes, All Varieties, By Districts, 1923-1948



of the Central Valley District, which exceeds that of any area other than the San Joaquin, is added to get the total acreage in the Interior Valley. Second, no district of any importance has greatly expanded plantings in recent years and none has been so adversely affected by production or marketing conditions as to retire any significant volume of acreage. The Central Coast and the Southern California Districts have each not much more than a tenth of the bearing acres now concentrated in the San Joaquin Valley alone, and even less when compared to the Interior Valley as a whole. But there has been no change in this relative status over the past twenty years. The Sacramento Valley alone has lost acreage, but there has never been heavy acreage there.

The non-bearing acreage situation is also quite stable. For the fifteen years immediately after the 1931 low, there was very little shift in any segment of the industries. Total non-bearing acreage climbed fairly sharply in the last years of the war. This climb represented increased plantings in all three of the main varietal classes. Non-bearing acreage in none of the varietal classes poses a serious threat to the stability of production in the near future.

Fig. 8. Non-Bearing Acreage of California Grapes, by Varietal Classes, 1919-1948



When regarded by districts rather than by varieties -- as in Figures 4, 5, and 6 -- it becomes clear that acreage of all varietal classes in most districts has been constant, or that changes in one varietal class compensated for opposite changes in others. There have been nearly 220,000 acres of raisin-type grapes bearing in the San Joaquin Valley for twenty years. Table grapes have run about 40-50,000 acres and wine varieties about 25,000 acres with little change in any component. About half the acreage in the Central Valley is in wine grapes. Table grapes -- like wine grapes -- have declined slightly but still are more than twice as heavy as raisin varieties. The Central Coast District grows practically nothing but wine-variety grapes. There is no perceptible trend yet apparent, with decreases in the last two years after more than ten years of continuous expansion. Southern California is dominantly a wine-grape area. Diminished acreage in table grapes has balanced a slight rise in raisin-varieties acreage, but the total in these two classes is not great. Total acreage in the Sacramento Valley has been decreasing since 1929. Since 1940, less than 750 acres in all varietal classes have been in bearing.

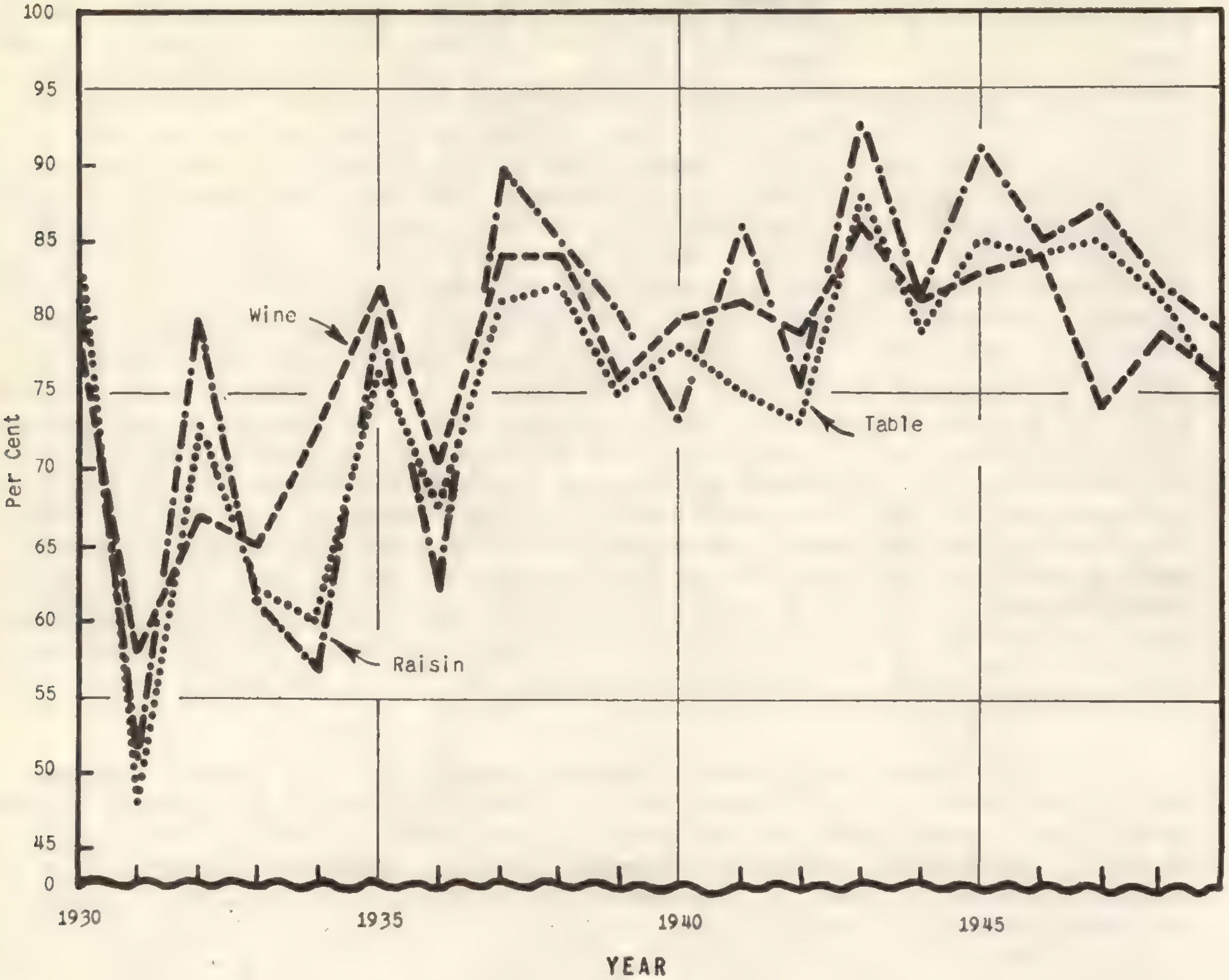
Zinfandel, Carignane and Alicante Bouschet are the major wine varieties, with Mission, Golden Chasselas, Grenache and Petite Sirah in a secondary group. Of vines standing in 1948 and planted between 1936 and 1948, the heaviest plantings occurred during 1944-1947. This is also true when red-wine grapes and white-wine grapes are separately considered. The red-wine acreage in the Central Valley is almost the same as that on the Central Coast. The much smaller total of white-wine types is concentrated on the Central Coast. For wine varieties as a whole, acreage stands about as follows: Central Coast, 60,000; Central Valley, 50,000; Southern California, 40,000 and San Joaquin Valley, 35,000. Thus the Interior Valley in total has the most acreage of all areas. There has been little change in the volume or distribution of wine-grape acreage regardless of how it is considered.

Almost the whole of the raisin industry lies in the counties of Merced, Tulare, Madera, Kings, Fresno and Kern which comprise the San Joaquin Valley District. About five per cent of the bearing acreage of these varieties in the whole state lies in Southern California. Of 46,000 acres of Muscats, less than 5,000 acres are in Southern California and the rest are in the San Joaquin. Of 200,000 acres of Thompsons, more than 180,000 acres are in the San Joaquin with about 8,000 acres in both the Central Valley and in Southern California. Of the acreage standing in 1948 and planted between 1936 and 1948, there is a concentration of plantings about 1940 and a far heavier peak in the age groups planted in 1945-1947. For the state as a whole, acreage of all raisins increased about 13,000 acres or about five per cent over the 1936 total up to 1948. This represented a decrease of about 19,000 acres or 29 per cent in Muscats and of 4,500 acres or 41 per cent in Sultanas, offset by an increase of 35,000 acres or 21 per cent in Thompson Seedless. The San Joaquin Valley accounted for an increase of 9,753 acres which represented gains of about 30,000 in Thompsons and decreases of about 17,000 and 4,000 respectively for Muscats and Sultanas. Southern California and the Central Valley showed small gains in Thompson acreage which offset slight decreases in Muscats. The major shift in this segment is the drop in Muscats. While the productive plant lies mainly in the southern San Joaquin Valley, percentage increases in acreage have been greater in other areas. The dominance of raisin-variety grapes in the history of total production of all varietal classes over the past two decades indicates that there has been a faster acceleration in yields per acre than in some other classes, but no serious shift in the distribution or size of total acreage.

There are three outstanding varieties among the table grapes. Tokays have held quite constant for fifteen years at from 26,000 to 27,000 acres. Emperor grapes have climbed sharply from about 17,000 acres in 1936 to about 31,000 acres in 1948. White Malagas, the third major variety, have decreased at a little less than the rate of increase in Emperors. Red Malagas, Ribiers and all other varieties combined have increased slowly and now all stand in the order of 6,000 acres to 8,000 acres. The stability of total acreage, the shift out of White Malagas and the shift into Emperors are the most striking recent changes in this segment. Plantings appear to have peaked in the late war years, as in the other groups. Most of these new plantings were Emperors. Tokay, Red Malaga and Ribier plantings have not greatly shifted. About two-thirds of the table varieties grow in the San Joaquin District. About thirty per cent of the acreage lies in the Central Valley. The only other area of commercial significance is Southern California, with less than five per cent of the total. Nearly all of the Emperors are in the San Joaquin District. Nearly all the Tokays are in the Central Valley. The White Malagas also are nearly all in the San Joaquin District.

Neither the doubling of total annual output of grapes or the violent changes in total output from year to year -- which have required continuous market expansion and frequent adjustment to sharp changes in total output among the three segments -- can be attributed to shifts in the acreage base of this industry. For the state as a whole, there have been no serious changes in total acreage in any of the three varietal classes. The total of each variety in the various geographic districts has been remarkably constant. In wine grapes, the Central Coast has a little more acreage than does the Central Valley. The Interior Valley as a whole is the major wine grape region. The raisin industry is almost wholly in the San Joaquin. The Interior Valley produces by far the bulk of table grapes. No major change has occurred in the acreage standing in any of these districts. Explanation of the marketing problems of the grape industries must be sought in other factors.

Fig. 9. California Grapes: Per Cent of Full Crop by Varietal Classes as of October 1, 1930-1949

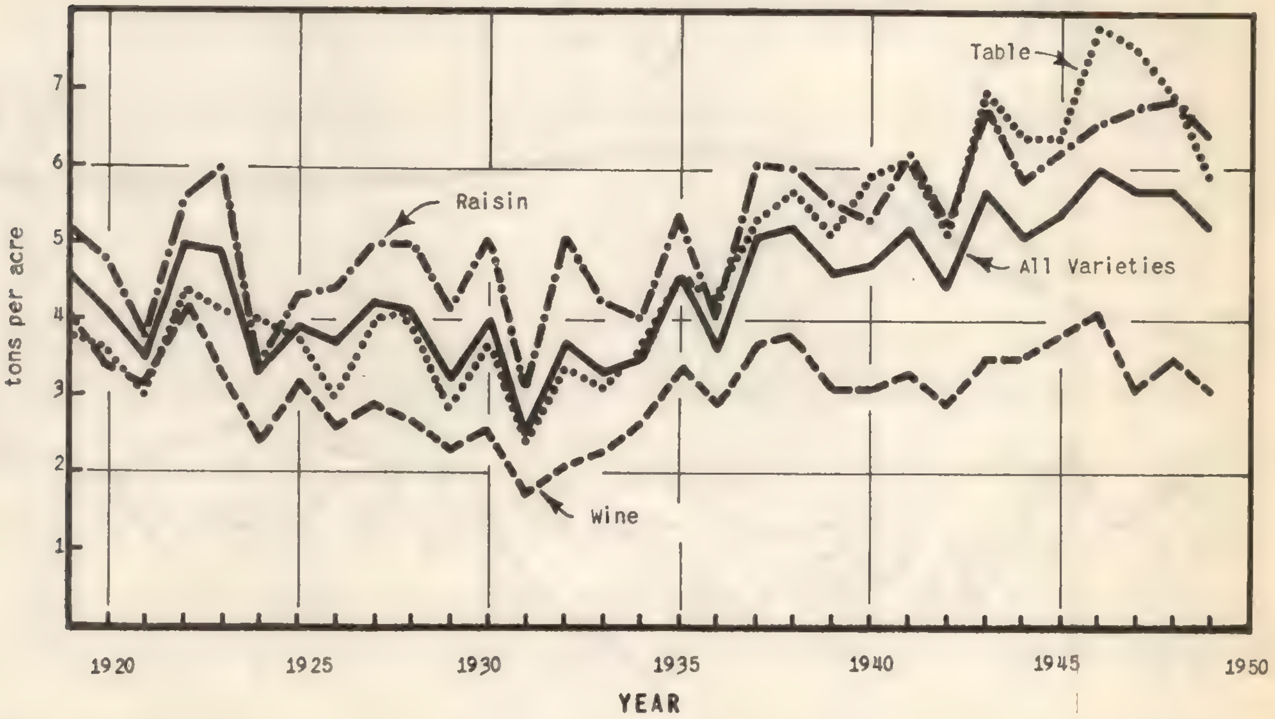


CONDITION: Both the upward drift of production and its annual fluctuations could conceivably be explained by similar changes in the determinants of crop condition. Annual weather variations would be the major determinant. Despite the improbability of any consistent twenty-year pattern of weather change, there is a clear-cut upward trend in reported per cent of full crop. This may be due to quite unconscious tendencies to confuse the effects of weather and other determinants of yield. Comparison of Figure 9 with Figure 1 indicates a fairly close relationship between total production and the reported per cent of full crop and also between annual variations in output of each of the three varietal classes. These relations merit further statistical study. Per cent of full potential crop realized seems to have varied most in raisins and least widely in the wine varieties. For all three classes, extremes in reported per cent of full crop have been greatest in the Sacramento Valley. The relative variation by varietal class and by district is shown in Charts 16, 17 and 18 in Appendix A.

It is clear that all of the variation in output in all classes seems -- again for all practical purposes -- to originate in changes in yields per acre. It would be logical to assume that year-to-year changes in per cent of full potential crop reported as harvested would vary among districts and varietal classes. However, the steady upward drift would not be expected, and its existence is most puzzling.

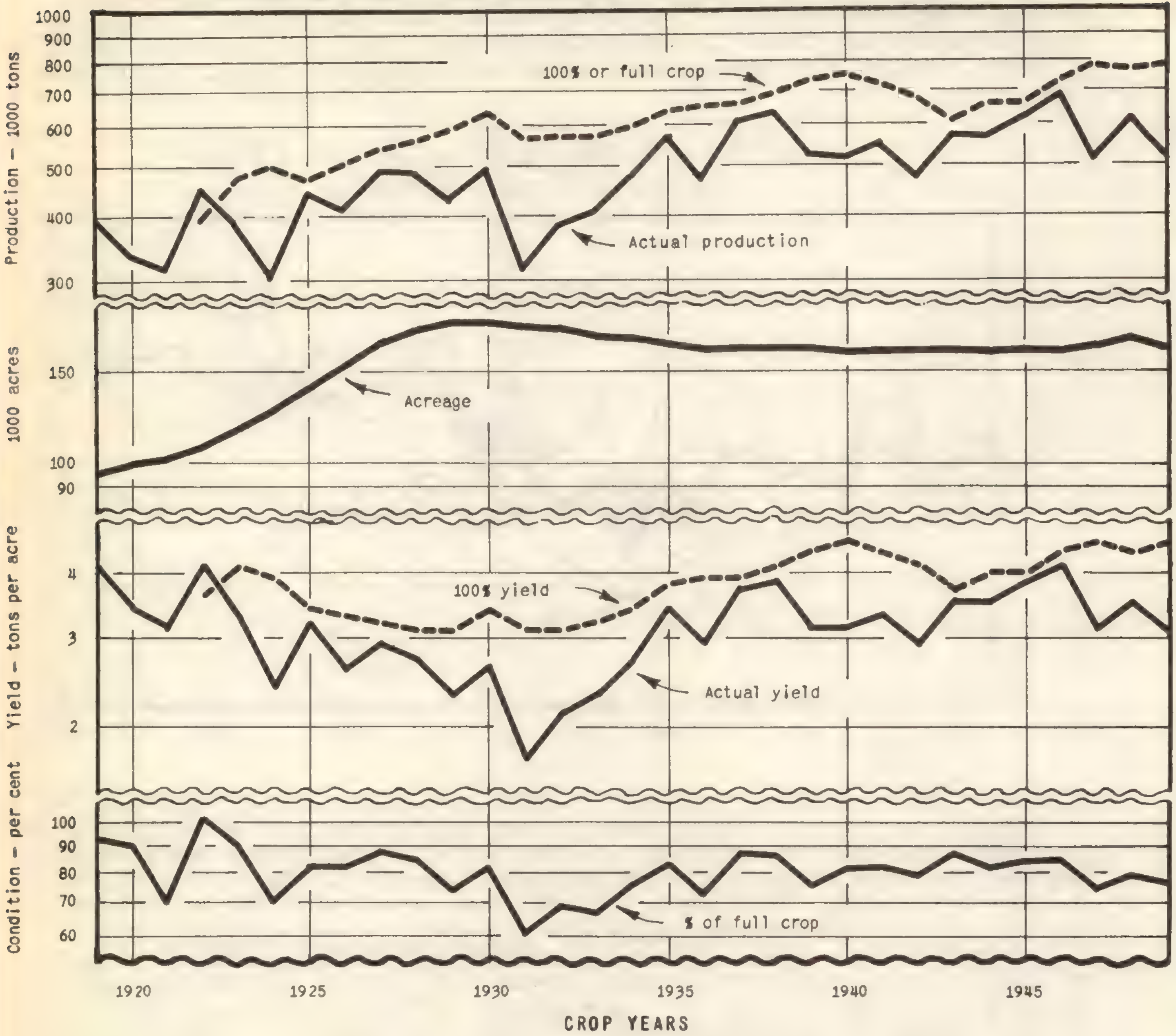
Changes in yield per acre might be expected to originate also from two other main factors -- the steady increase in knowledge of output-determinants and the changes in business outlook. These in conjunction with changes in such factors as fertilizer-costs, irrigation and other costs, might lead to changes in annual yields per acre.

Fig. 10. Yield Per Bearing Acre of California Grapes by Varietal Classes, 1919-1949



YIELD: Whether it be due to weather, technological knowledge or response to price-cost outlooks -- the changes in the production of grapes which have been so vexatious are associated closely with parallel changes in yield per acre. Figure 10 shows this clearly. The average yield per acre for all varieties had dropped to a low of about 2.5 tons per acre in 1931. In 1946, the average yield had climbed to 6 tons per acre. Increases in tons per acre differed among the varietal classes -- wine from 1.7 to 4 tons; raisins from 3.2 tons to about 6.8; table grapes from 2.4 tons to about 7.9. As a per cent of the 1931 yields, however, the varietal classes did not greatly differ. Two facts are clear: (1) this is a long-run and very stable rate of increase, which is not correlated with the business cycle; (2) it seems doubtful that the steady upward trend over fifteen years can be due to weather. It seems logical to assume that since the rise continued during the depression period of 1937-1938 and did not greatly accelerate during the war boom, it is not due to changes in pruning, irrigating, fertilizing or other output-determinants which would be changed as the expected price of grapes or the expected price of cost-factors changed with the business cycle. Yields of raisins have been down for one year and the others have decreased over the past three years. It is not safe, however, to assume that the long-run upward trend -- which started long before the rise in grape prices -- has been reversed. It is possible that the rise in yields is independent of economic outlook and it may be largely independent of weather shifts. If this rising output per acre -- which explains nearly all the change in output of grapes -- represents increased cultural efficiency, then very large crops may occur at any time. Acreage is the same as in 1946. Given the same yields, nearly 3,000,000 tons could be produced again in any year.

Fig. 11. Bearing Acreage, Production, Condition of Crop, and Yield Per Bearing Acre of California Wine - Grape Varieties, 1919-1949



PRODUCTION SUMMARY: The next four figures have been arranged on a scale such that the rate of increase in all of the series shown on each chart may be directly compared by comparing the slope of the line representing the series. Figure 11 shows that there has been no increase in bearing acreage of wine grapes; that per cent of full crop reported has not changed much since 1936; that actual yield per acre just about doubled from 1931 to 1946, a rate not greatly different from that of the other varieties; that the calculated full crop which might have been attained with 100 per cent condition and with actual acreage have approximated 750,000 tons; and finally, that actual production which was only about 300,000 tons in 1931 came close to 700,000 tons in 1946. The acreage from which this yield of near 700,000 tons was obtained is still in bearing.

Fig. 12. Bearing Acreage, Production, Condition of Crop and Yield Per Bearing Acre of California Raisin Grapes, 1919-1949

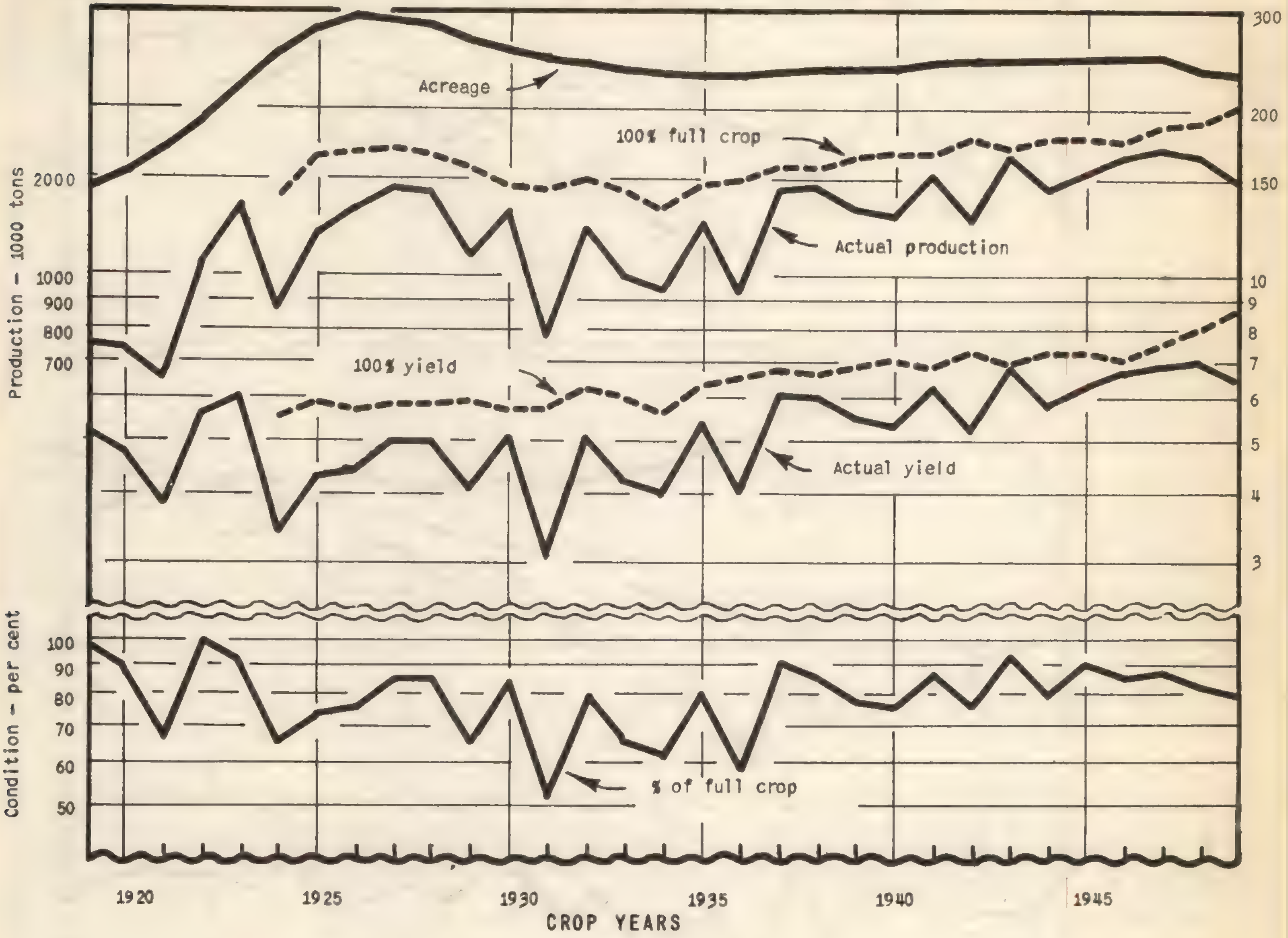
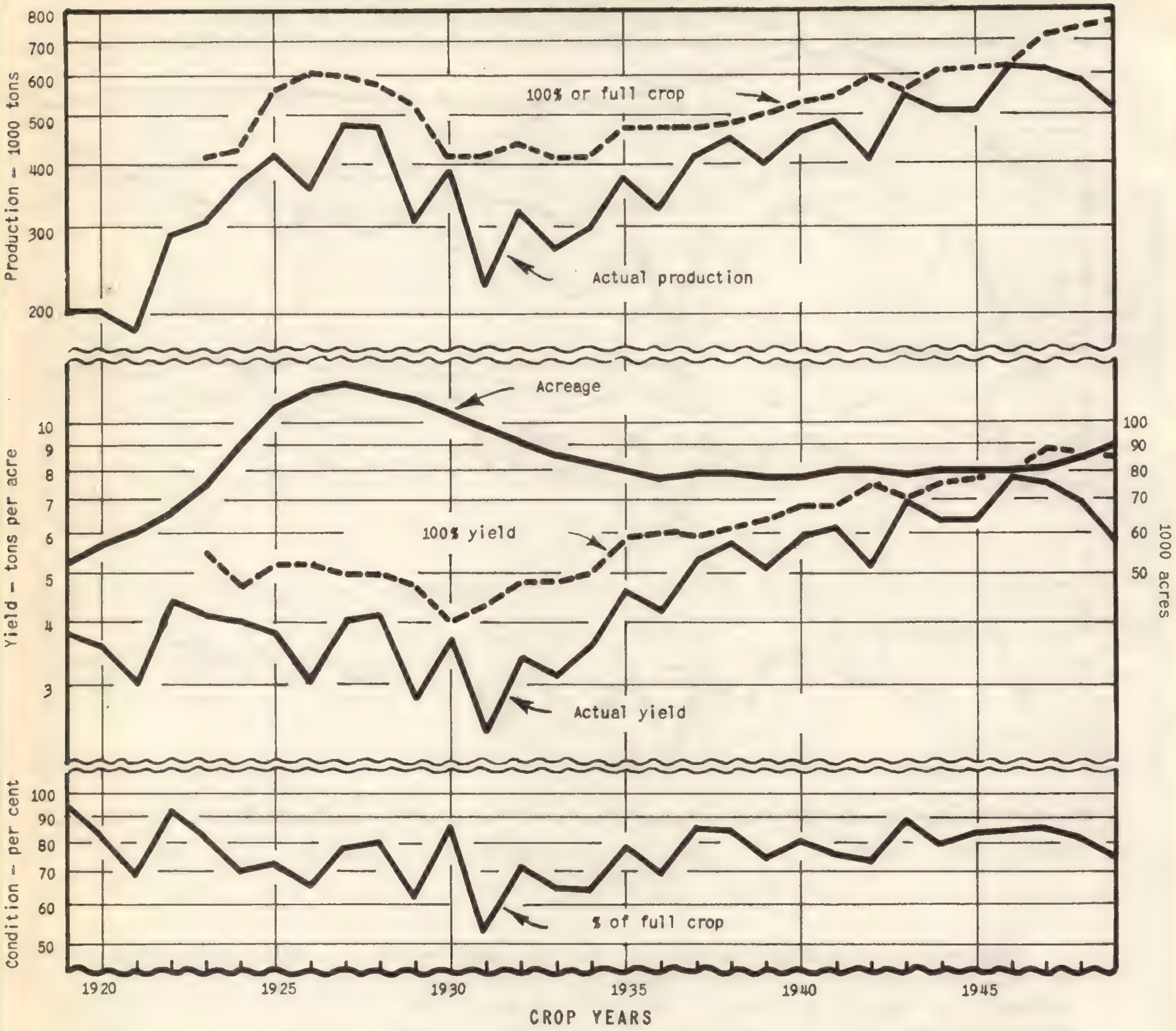


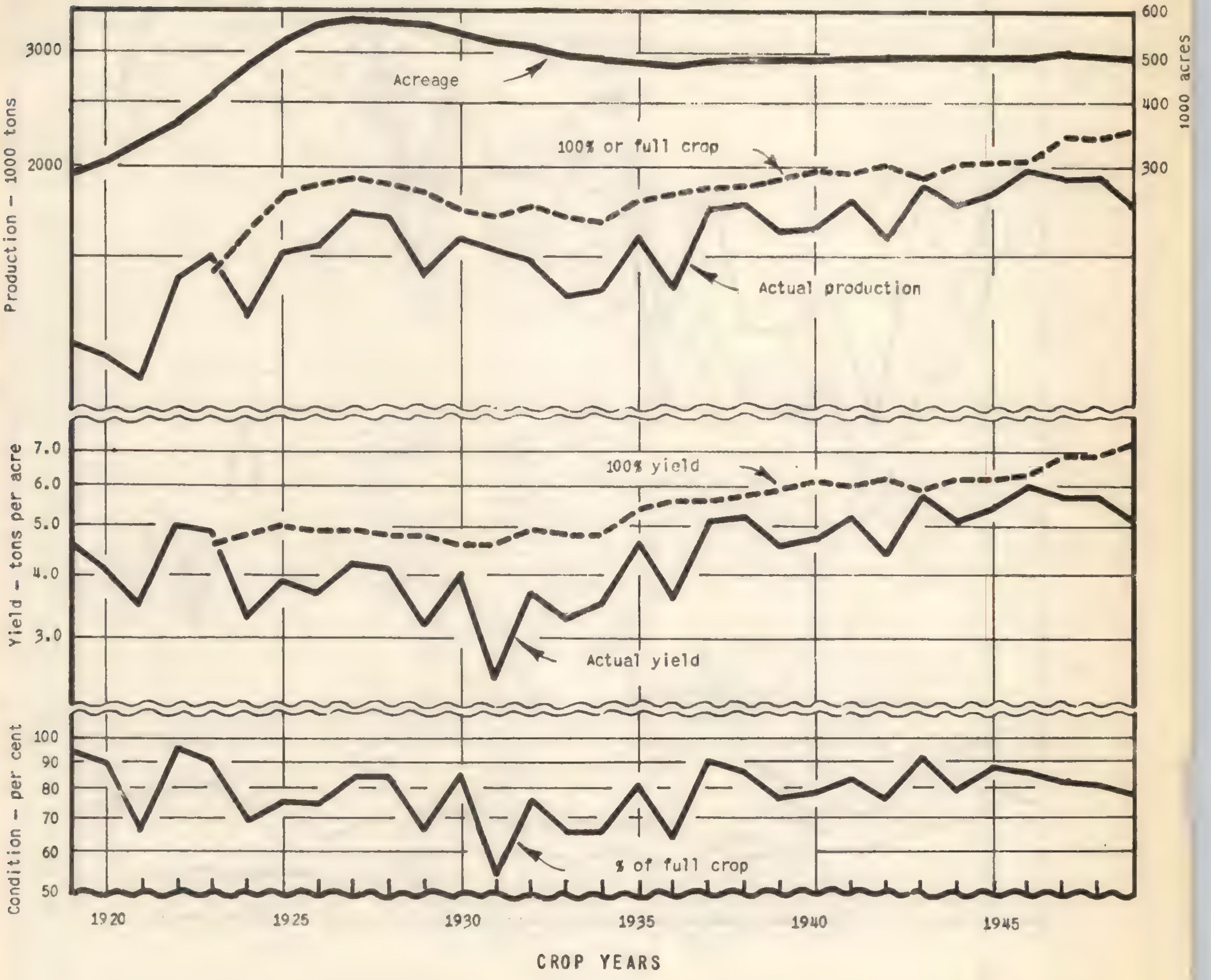
Figure 12 summarizes the history and the implications of total production in the raisin segment of the grape industry. Again, the rise in acreage when expressed as a rate or per cent is almost imperceptible. Yet actual output rose between 1931 and 1946 from less than 800,000 tons to about 1,700,000 tons. The calculated maximum crop which could have been gotten with ideal condition was even greater. Just as in wine grapes -- and even to a greater degree in table grapes -- the steep rise in the production line is almost exactly the same as the slope in the yield-per-acre line. Raisin yields more than doubled. Crop condition seems to have improved, although it is probable that this is due to biases in reporting per cent of full crop. The important fact is that this steady increase seems independent of economic outlook and is probably attributable mainly to improved cultural practices. If that is the case, in any year in the near future, the total output of raisin variety grapes could again go well over 1,500,000 tons. The acreage is still in bearing. The cultural practices -- regardless of their possible effects on quality of grape or strength of vine -- are still available. Weather could be good. Taken in combination, the fifteen-year trend which resulted in the huge 1946 out-turn could well be surpassed.

Fig. 13. Bearing Acreage, Production, Condition of Crop and Yield per Bearing Acre of California Table Grape Varieties, 1919-1949



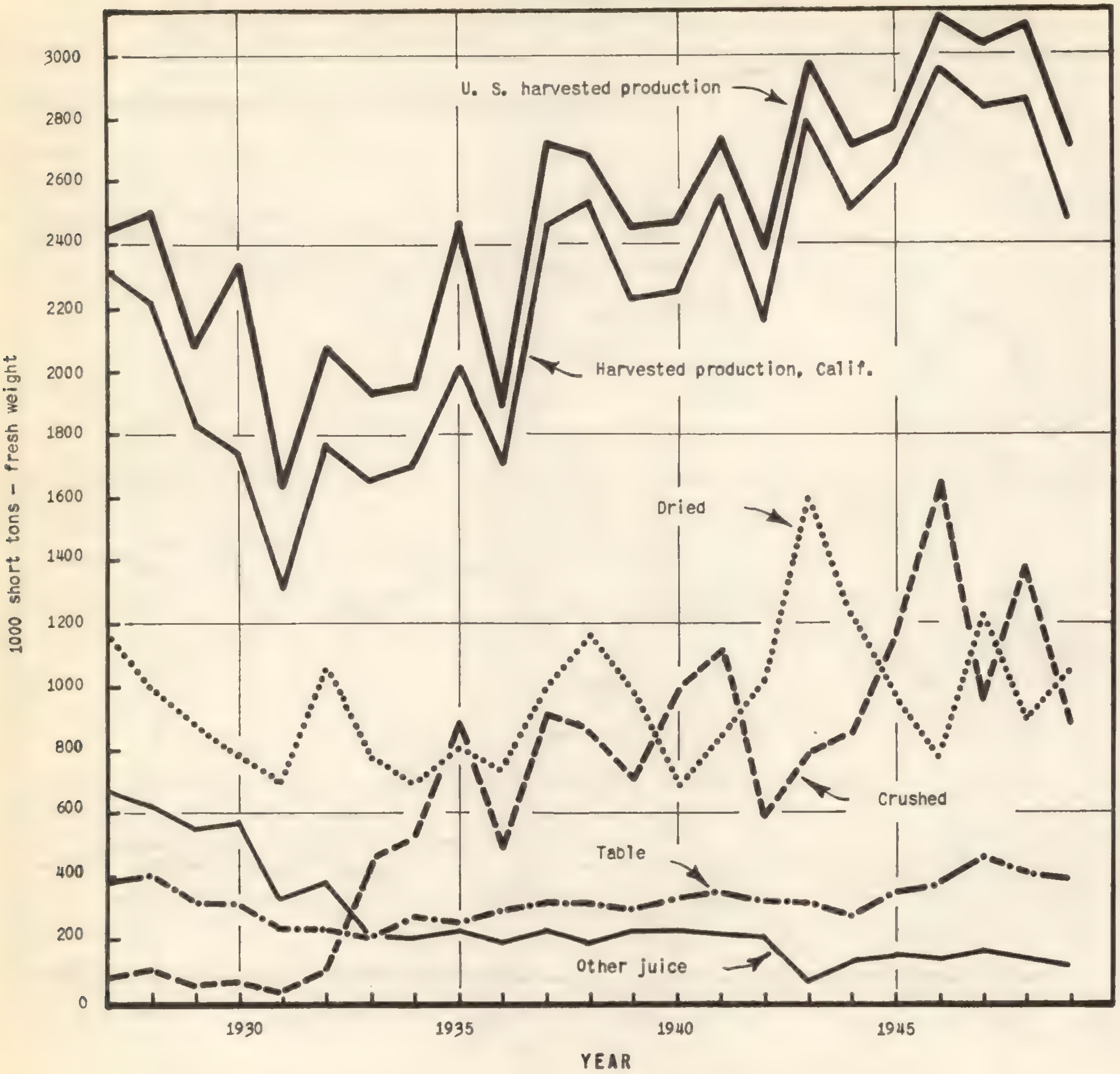
In the fifteen years of increasing production, the output of the table-variety grapes almost tripled. The acreage base declined until 1935 and has been fixed since then. Reported per cent of full crop has been fairly constant since 1937. The one factor which has changed significantly is yield per acre, which was less than 2.5 tons in 1931 and more than 7.5 tons in 1946. A crop of table grapes in excess of 600,000 tons has been produced. Such a crop far exceeds the quantity which can be sold in fresh table outlets at remunerative prices. It places extreme pressure on the wineries, to which the output not profitably salable in fresh channels is traditionally diverted. In the process, it may constrict the traditional winery outlet for raisin-type grapes and,the value of both raisin and wine grapes may be depreciated. These same observations are applicable to any one of the three classes. Both the production and market aspects of these three groups are almost identical.

Fig. 14. Bearing Acreage, Production, Condition of Crop, and Yield Per Bearing Acre of All Varieties of California Grapes, 1919-1949



When the three varietal classes are aggregated and a composite picture of production and its determinants is presented, the essential similarity of trends in all three segments becomes apparent. Total acreage has remained steady at about 500,000 acres for nearly twenty years. In the last twenty-five years, the rise in output to near 3,000,000 tons represents almost a doubling. The apparent improvement in condition-reports shows up, but the striking series is the yield per acre. Almost constant prior to 1931, yield rose without real interruption up through 1946. If this rise is not due to random variation in weather conditions, then the peak production of 1946 again might be reached. The duration of this trend of rising yields and its apparent independence of the economic fluctuations of the period suggest that the rise is founded on technological improvement in grape culture. The grape industries should therefore recognize that at any time they may be faced with extremely heavy yield in all segments and therefore with very heavy total production. Market organization should be oriented towards three production characteristics of the industries: expanding output; erratic changes in output; and substitutability among the varietal classes.

Fig. 15. California Production and Utilization of all Varieties of Grapes
1927 - 1949



UTILIZATION: Figure 15 shows all three of the production characteristics from which many marketing difficulties seem to have come. Expanding and erratic production have already been analyzed. The third factor -- the use of some grapes in two or three outlets -- is also demonstrated. The chart shows that there are really four major markets for California grapes and that all of them are closely interrelated. Grapes may be dried for raisins; crushed commercially; sold fresh for home crushing or other juice; and sold for fresh table use. There have been major changes in most of these utilizations. The table market has grown steadily but at a much slower rate than the production of table-variety grapes. At the peak year of 1947, about 450,000 tons went into table outlets. The relatively minor annual fluctuations in tonnage sold in these channels should be considered against the wider annual variations in production of table grapes shown in Figure 1. This means therefore a wide annual fluctuation in the tonnage of table variety grapes diverted to wineries. When considered as a percentage of total harvested production, no trend in utilization of the table varieties appears. On the average, about thirteen per cent of harvested grape production goes into these outlets, and deviations from this average level show no systematic pattern.

There is a long-run shrinkage in the utilization of grapes for juice other than commercial crushing. Even in the five years prior to the repeal of the eighteenth amendment to the Federal Constitution, shipments for this purpose were falling radically. Since 1933, grapes used for this purpose have dropped slowly from about 200,000 tons to about 100,000 tons. It is probable that as immigrants from wine-drinking countries become fewer, this outlet may shrink even further.

The utilization of grapes for commercial crushing has changed in three main ways. As would be expected, there was a precipitous rise after repeal to more than 800,000 tons by 1935. Since then there has been a slow upward drift except for the three war years 1942-44. But most striking and of most economic significance is the fact that the amount crushed in successive years has differed by as much as 600,000 tons of grapes or 60,000,000 gallons of wine. These year-to-year changes in tonnage crushed have not been related to the market outlook for commercial wine. To some measure they have been related to changes in the total production of grapes. To a greater degree they have been related to factors affecting production and demand in the raisin and table segments. Low price expectations in these two segments, bad weather in the raisin industry, heavy production in either raisin or table varieties, low supports in raisins or stringent market controls can and have meant heavy diversion of grapes to wineries. The relationship of utilization for raisins versus commercial crush is clear from Figure 15. Expressed as a percentage of total harvested production, there has been a slight drift upward since 1934. More serious is the wild fluctuation in the percentage of total production which has gone to wineries each year. This percentage has varied from less than thirty to more than fifty over the last decade. When total juice utilization is considered, the fluctuations are much the same. The important economic fact is the absence of relationship between a heavy crush and conditions in the wine industry alone. Vintners and raisin handlers have both had their supplies largely determined by conditions in other industries and inventory-values have shifted in response to the same influences.

The raisin segment shows the same pattern as the wine outlet, with heavy crushes generally occurring in years when the lay of raisins was light and vice versa. Percentage-wise, the violence of fluctuations is about the same as in the winery channel. The lay of raisins apparently responds to a variety of factors determining the expected price levels for grapes as raisins, as wine and in some measure as grapes for fresh table use. If wine inventories are high or wine demand low, their effects may spill over into the raisin and table markets by inducing a heavy lay of raisins or heavy diversion to table use. Thus adverse market conditions in the winery segment immediately create adverse effects on the other two markets. Prices per ton of all kinds of grapes vary in almost exactly the same way. This is due to the fact that if prices in table use or wineries are high relative to prospective raisin prices, growers will divert from raisins until the raisin price rises and the table and winery prices fall and equal returns in all outlets are gotten. A heavy production of wine grapes can adversely affect prices for raisin and table grapes despite being unsuitable for sale in those markets through lowering prices in the winery channel and thus inducing heavier than normal utilization in the other two outlets.

Fig. 16. Varietal Sources of Grapes in Major Utilization, 1945-1948

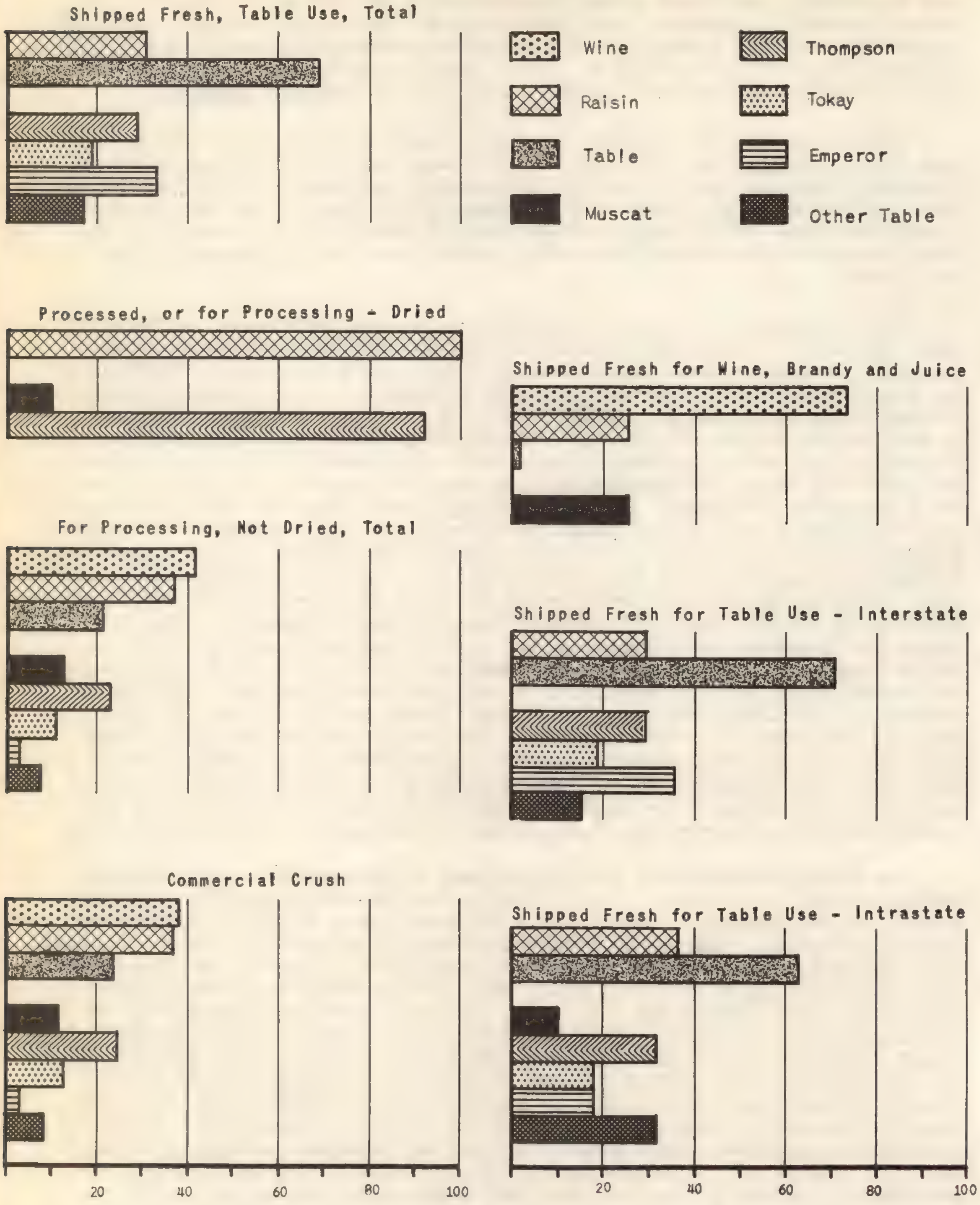
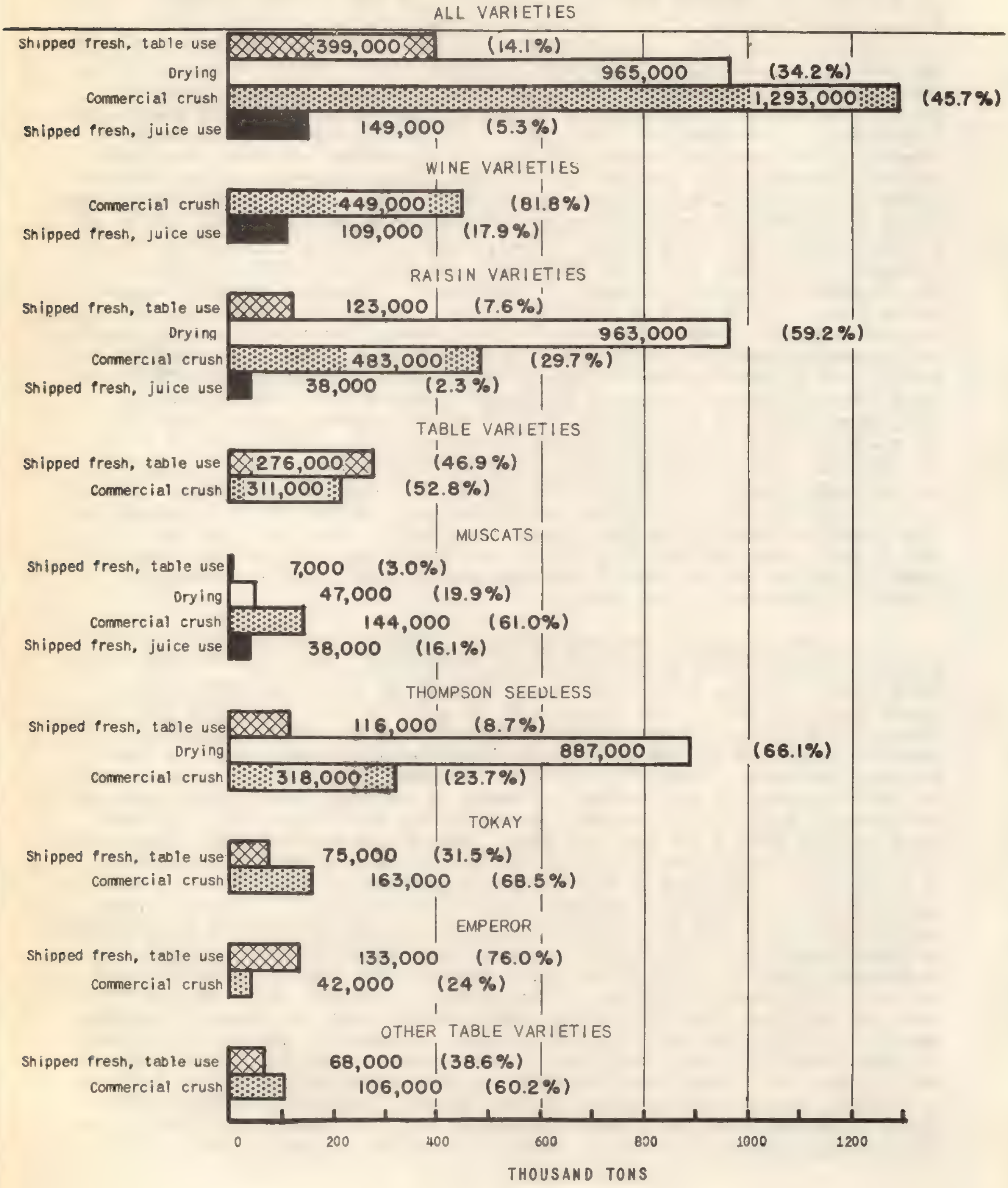


Figure 16 indicates in a different way the same interdependence in utilization. More than thirty per cent of shipments for fresh table use are grapes which can also be dried for raisins. One-third of fresh shipments for table use are Emperors but Thompson Seedless comprise 29 per cent of 1945-48 sales. This is more than Tokays at 19 per cent or of all other table varieties combined at about 17 per cent. Only raisin varieties may be used to make raisins. Thompson seedless are the dominant source with more than 90 per cent of total raisin production and Muscats comprise about 5 per cent. For all processing other than drying, wine grapes constitute over 40 per cent of the total, raisin grapes about 37 per cent and the rest are table grapes. Thompson grapes comprise nearly a quarter of the processed grapes. Muscats and Tokays make up about one-eighth each of the total. For commercial crush, Muscats and Tokays are each about one-eighth of the total and Thompsons are again about one-fourth. About three-fourths of the grapes shipped fresh for juice are wine varieties. Almost all of the remainder are Muscats. Thus when it is asked what grapes are used in the various channels, it is clear that raisin and table grapes are and have long been used interchangeably in fresh shipments for table use. Thompson, Tokay and Emperor grapes constitute the bulk of these shipments. On interstate shipments for juice, Muscats which are classed as a raisin variety account for a fourth of the supply. For commercial crushing, almost equal parts of the total supply -- about three-eighths each -- are made up of wine and raisin varieties, and about a fourth are table grapes. Muscats, Thompsons and Tokays dominate here. In terms of utilization, there appear to be no grapes limited only to table outlets. Similarly, the so-called raisin varieties traditionally constitute large fractions of the raw materials for other uses. Wine grapes are the only ones which can be used in the single channel, but even so changes in the supply of wine grapes affects the prices gotten for other grapes in the same ways and for the same reasons as wine grapes are affected by the others. In 1945-48, there were about 500,000 tons of wine grapes and nearly 150,000 tons of Muscats, about 310,000 tons of table grapes and 340,000 tons of seedless raisin grapes used for commercial crushing on the average each year.

Figure 17 on page 20 asks this question: what are the major uses made of the three varietal classes and of the main varieties in each one of them? In the three years, 1945-48, commercial crush accounted for nearly 1,300,000 tons of grapes or 46 per cent of the crop. About 34 per cent or 965,000 tons were dried. About 400,000 tons or 14 per cent were shipped fresh for table use. About 150,000 tons on the average over the four years went out each season as fresh shipments for juice. About 82 per cent of the wine varieties went to wineries and the remainder for home crushing. Nearly 60 per cent of the raisin varieties were dried, nearly 30 per cent went into wineries, about 8 per cent for fresh table use and about 2 per cent for juice. Some 47 per cent of table grapes were used for table consumption and nearly 53 per cent of them went into wineries. It is therefore inappropriate to regard such products as grown for table use only or even to look upon the winery outlet as a by-product. A channel long-used and receiving over the years more than half of production must be considered by growers, in determining whether to plant table varieties, as a regular and legitimate channel. By varieties, it is equally clear that varietal classifications are often purely formal. Three-fourths of Muscat tonnage is used for juice and only one-fourth for drying. Only two-thirds of the Thompson Seedless production is dried and nearly a quarter goes to wineries. Almost 70 per cent of Tokay production went to wineries in these years. More than 60 per cent of table grapes other than Tokays and Emperors are crushed for juice. In the face of long and regular sale of raisin-variety grapes to both table and juice outlets, and of table-variety grapes to wineries, it is difficult to classify these multi-product grapes in any single class. It has been estimated that of the

Fig. 17. California Grape Utilization by Varietal Classes and by Major Raisin and Table Varieties, Average Annual 1945-1948, in Tons Fresh Weight and as Percentage of Total Harvested Production by Varietal Class or Variety



650,000 tons of table and raisin variety grapes other than Muscats going to wineries, some 450,000 tons are used for high-proof brandy, about 50,000 tons for unfermented juice and concentrate and only about 150,000 tons for wine on the average each year.

Fig. 18. Per Cent of Each Major Utilization by Major Varieties
Average 1945 - 1948

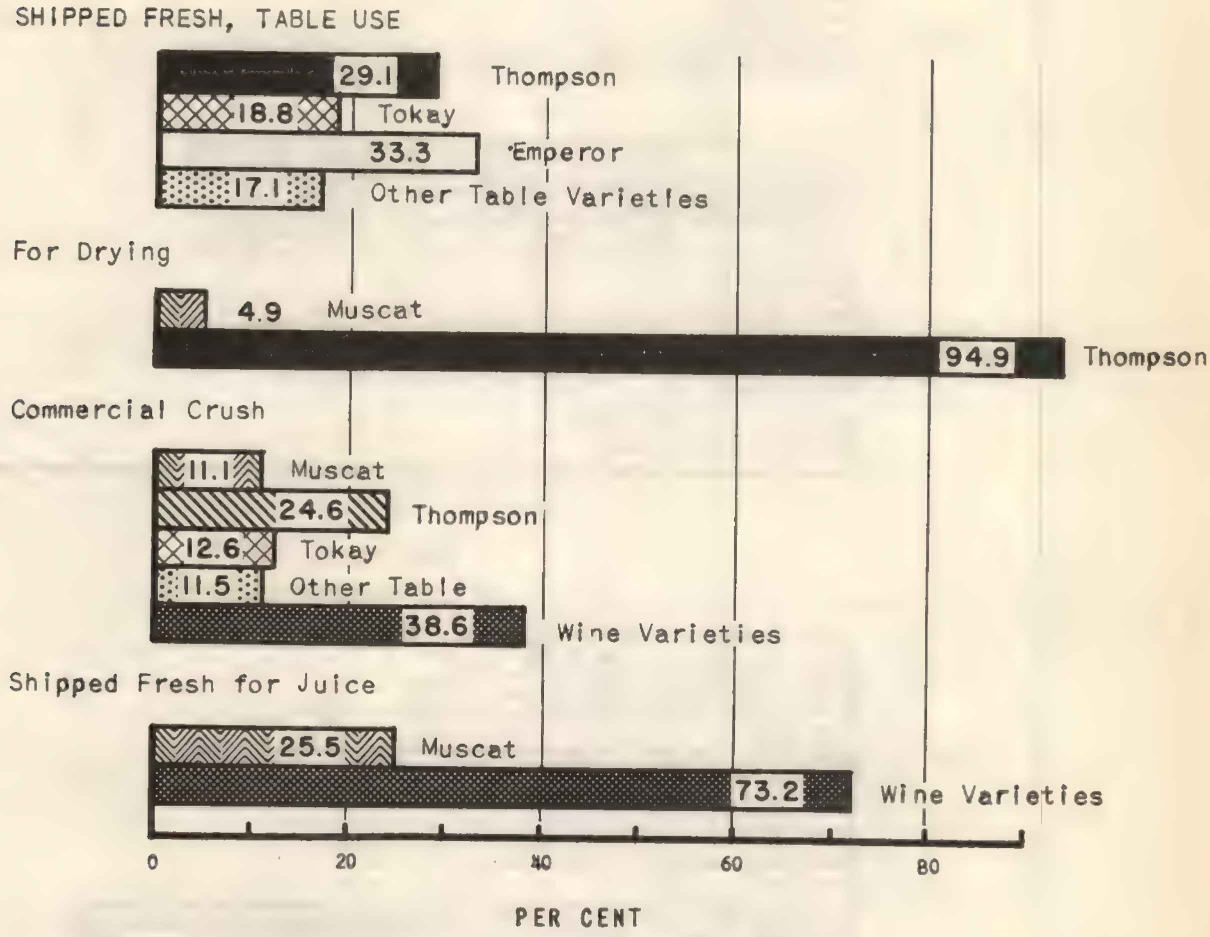


Figure 19 on page 22 compares directly the tonnage of grapes used for drying and for commercial crushing. It shows again that neither table nor wine grapes are of any importance in the raisin outlet. On the average, in the four years 1945-48 wineries used almost 1,300,000 tons of grapes each year while the raisin channel took about three-fourths of that amount with an average annual utilization of 965,225 tons. A little less than a half million tons of raisin variety grapes -- including about 150,000 tons of Muscats -- went to wineries each year. This was just a little less than the tonnage of wine grapes used in winery outlets.

The general utilization picture may therefore be summed up by noting the stability in tonnage going to fresh outlets, the steady decline in fresh shipments for juice, the long-run rise in utilization in both the raisin and the winery outlet, with the latter taking considerably more grapes each year than the raisin market. Probably most important of all is the difficulty of defining varietal classes. More than half of the grapes nominally labeled as table varieties regularly and for a long period have gone to wineries. Almost as many raisin grapes as wine grapes go to wineries. Thus the multi-purpose nature of these grapes must be recognized and the economic elements involved in the inter-locking markets for all grape products should also be emphasized.

Fig. 19. Average Annual Utilization of California Grapes for Drying and Commercial Crush, 1945 - 1948 in Tons and as Per Cent of Average Annual Harvested Production

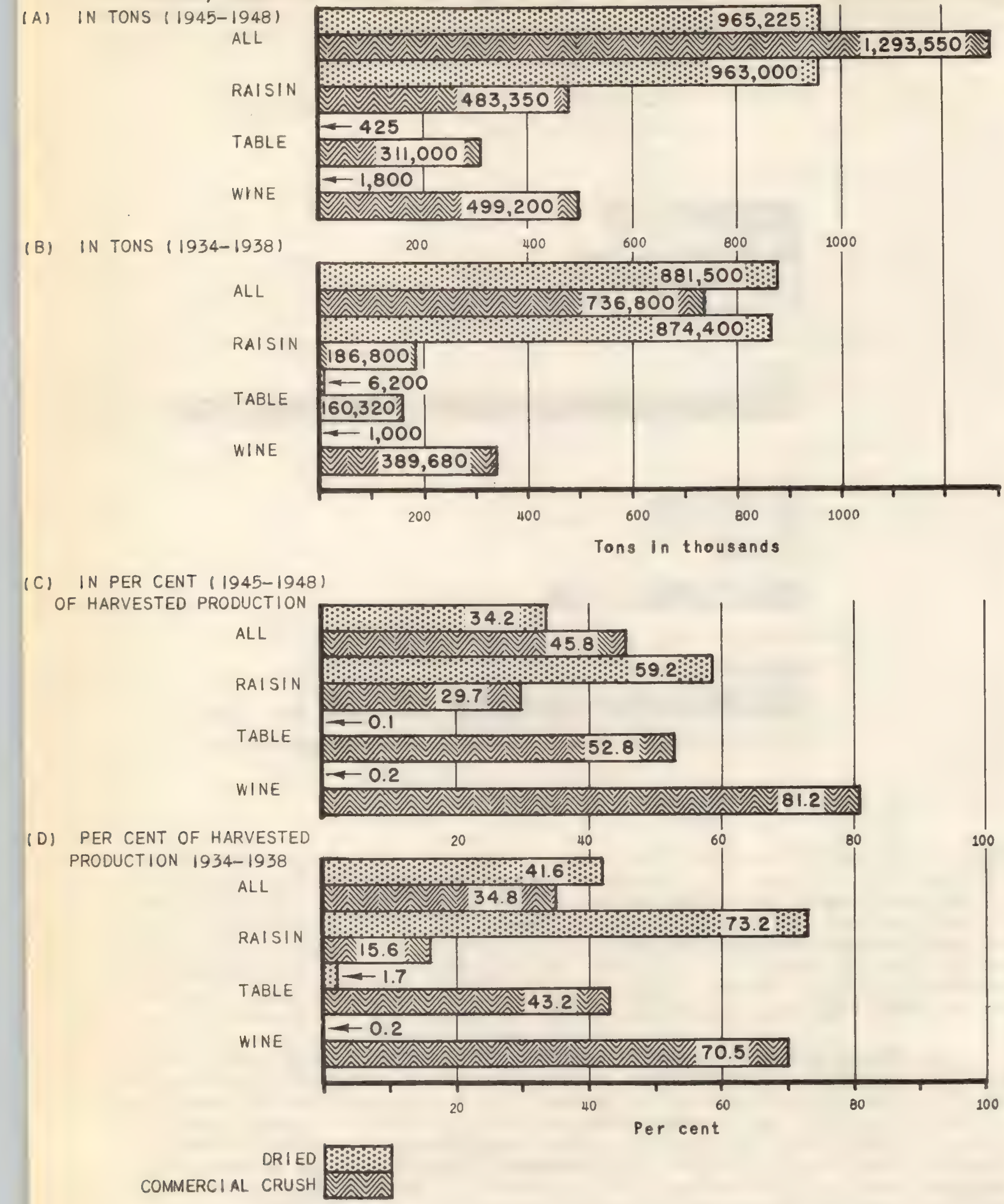
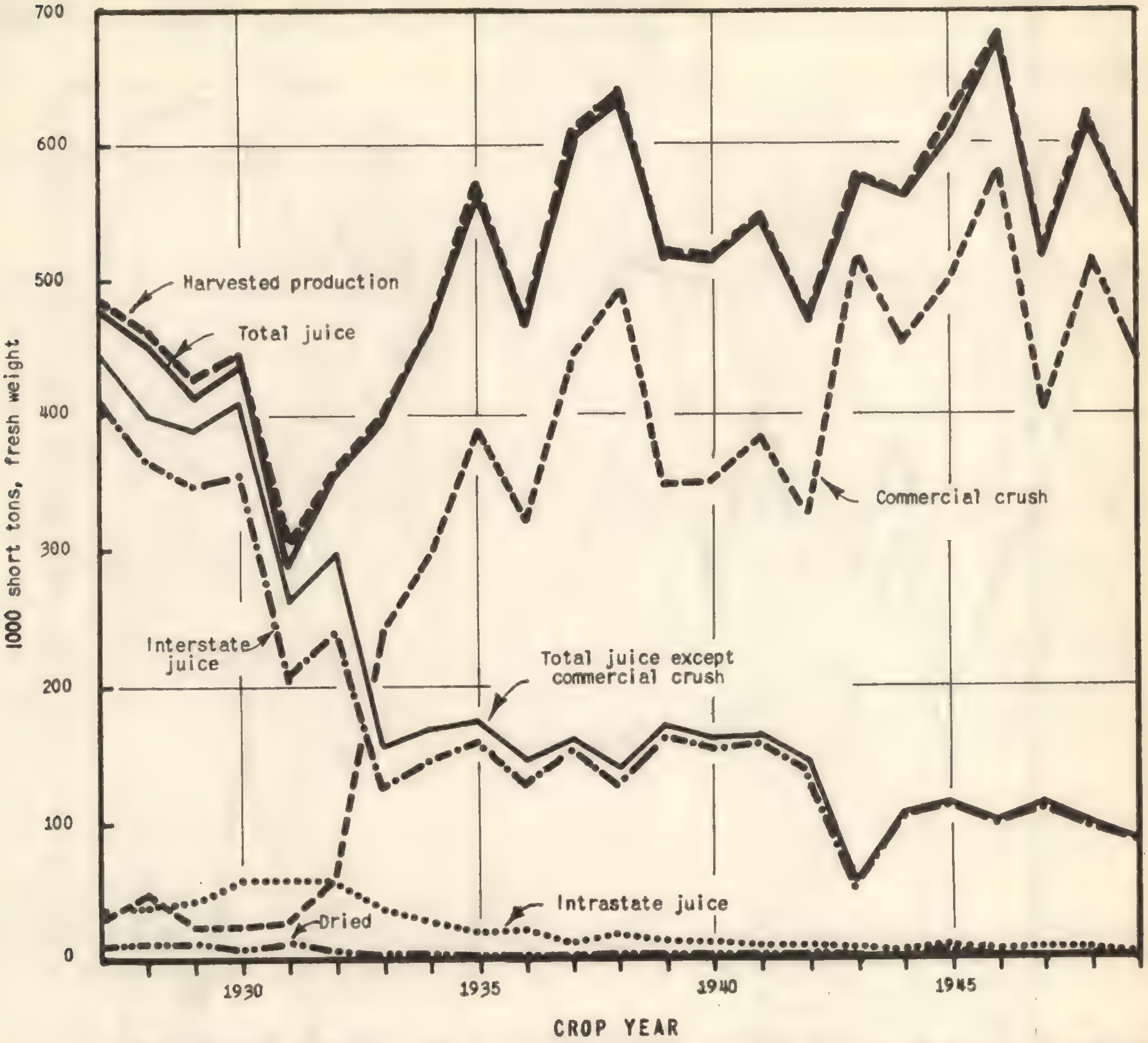
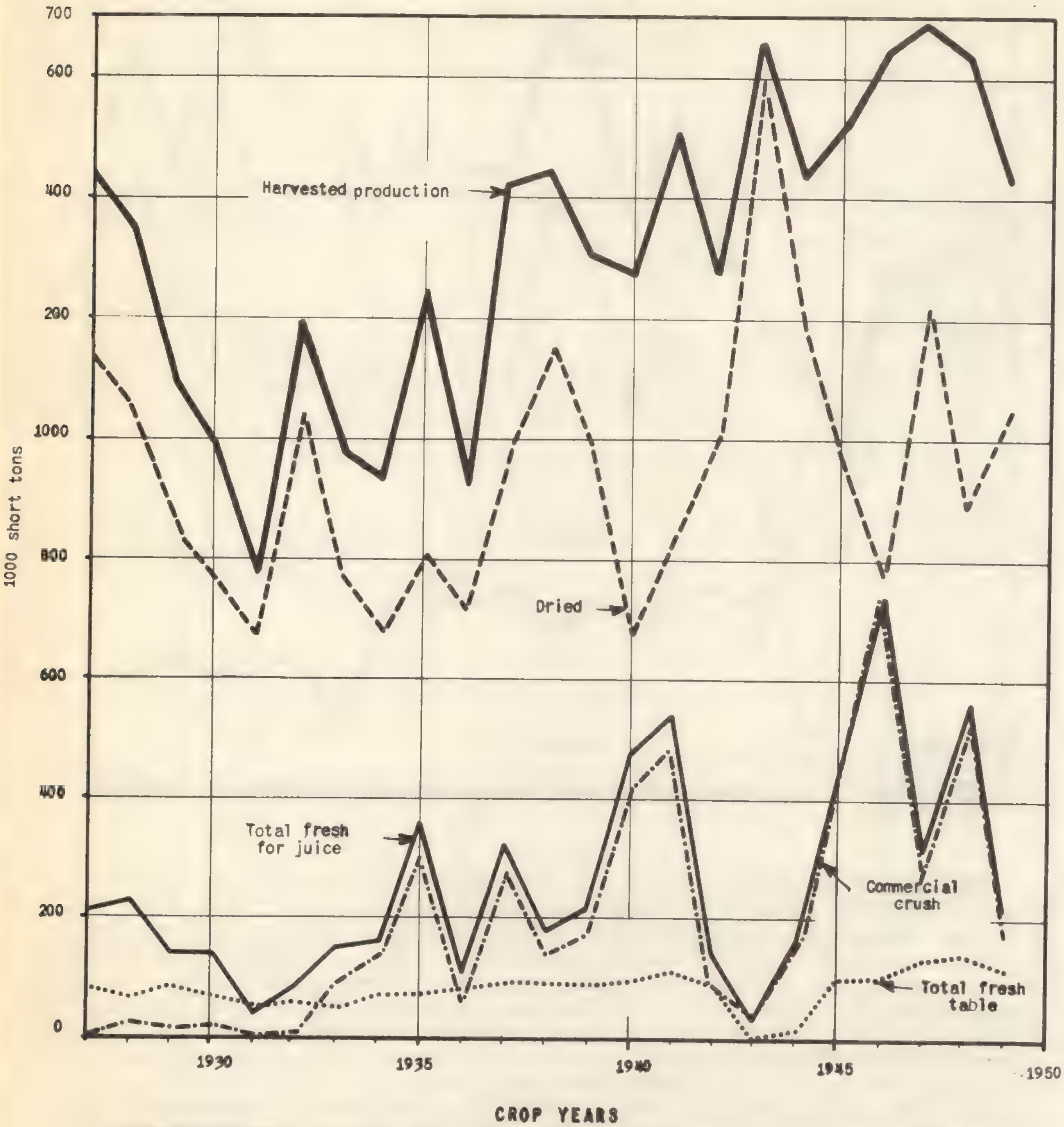


Fig. 20. California Harvested Production and Utilization of Wine Grape Varieties 1927 - 1949



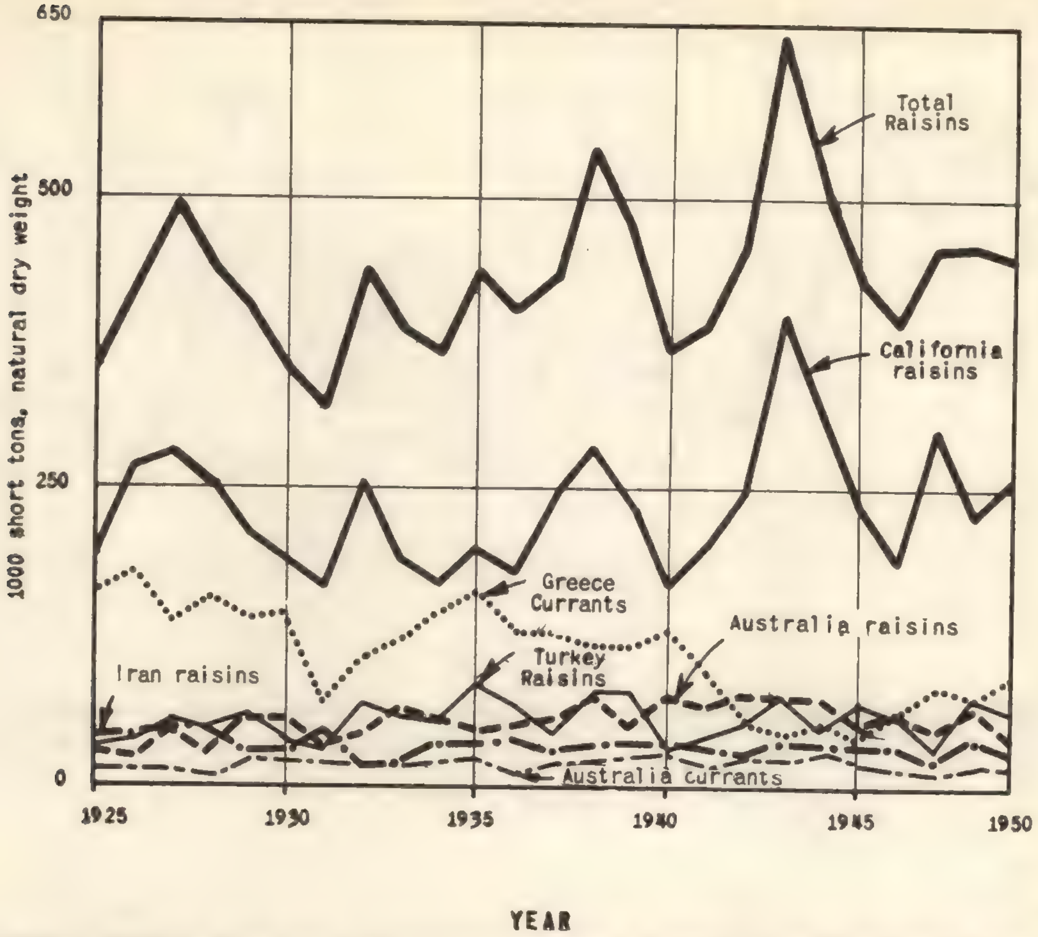
WINE GRAPES: Figure 20 shows the major changes in recent years in the wine-grape utilization. There are, of course, no recorded sales for table use. Use in dried outlets has always been minor and is virtually disappearing. The sharp drop in total sales for juice at the time of repeal of the Eighteenth Amendment was to be expected. However, there has been a continuous trend downwards in such sales probably as a result of diminished immigrant population. This trend towards smaller home-made wine consumption should continue and will probably level off at a level of utilization considerably below the present rate. Intrastate sales of wine grapes for juice have become almost negligible. The major outlet is, of course, commercial crushing, which in three years has absorbed more than one half million tons of wine grapes in utilization. Ultimately, it would be reasonable to expect, the commercial winery will be the single commercially-significant outlet from the view of the industry as a whole. Shipment for juice has taken less than twenty per cent of the crop in six of the last seven years. In the same period, commercial crushing has absorbed more than eighty per cent of wine grapes. The juice-shipment business developed after 1918 when wine consumption rose as high as 0.30 gallons per years per capita. During the prohibition period, therefore, there was some shift over towards wine grapes with especially good shipping characteristics.

Fig. 21. California Harvested Production and Utilization of Raisin Grape Varieties 1927 - 1949



RAISIN GRAPES: Nearly all of the economic characteristics which are important to the grape industries as a whole are reflected in the pattern of utilization of raisin grapes. The 1946 production of about 1,700,000 tons was more than twice as large as 1931 output. Production has changed from one year to the next by as much as 500,000 tons. Probably more important, the amount dried for raisins has fluctuated by as much as 600,000 tons from one year to the next. Thus far there has been no statistical analysis of the determinants of the distribution of raisin variety grapes among their various outlets, nor of the effects of alternative patterns of distribution. The violence of changes was greatest as a result of government

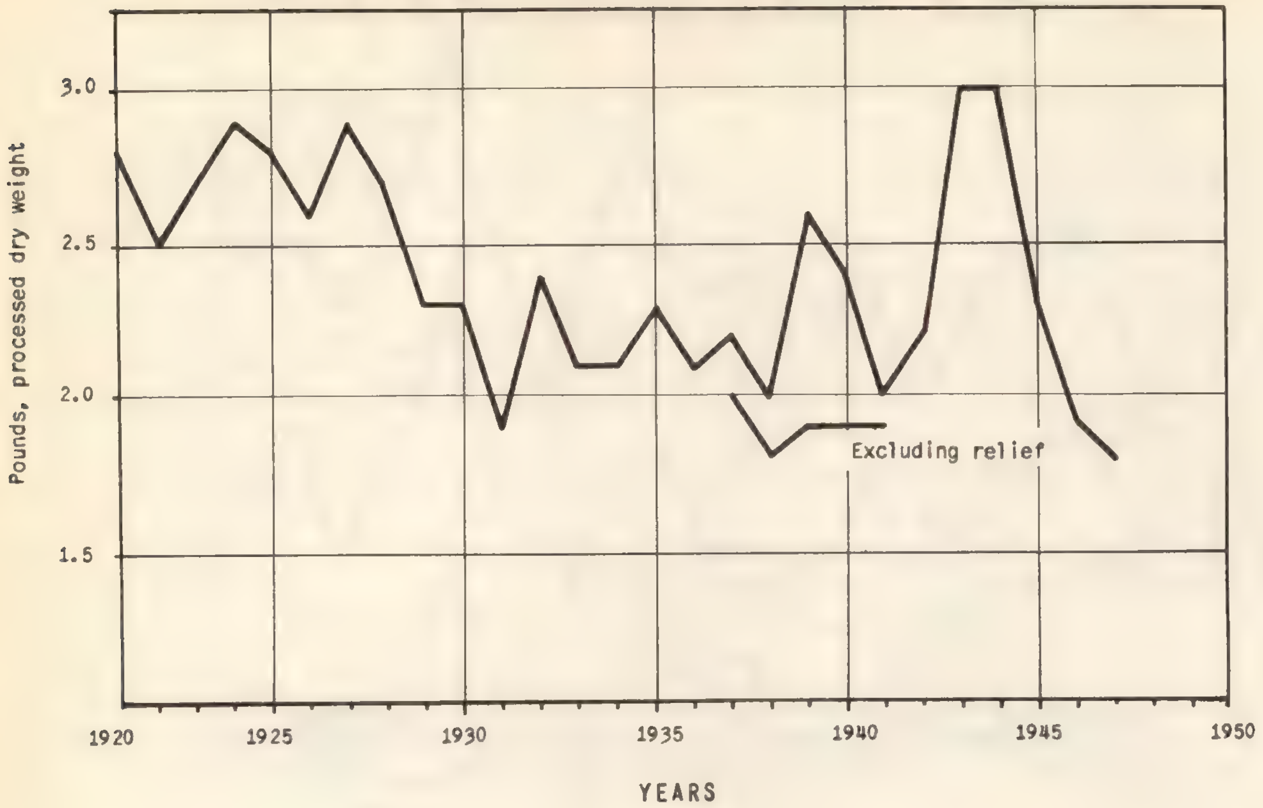
Fig. 22. World Raisin and Currant Production by Chief Countries, 1925 - 1949



directive during the war. However, prior to repeal, utilization of grapes for drying varied mainly with harvested production. Since that time, the year-to-year changes have not differed in kind but have taken on much greater amplitude. Thus in 1943, more than 1,600,000 tons of grapes were laid on trays. In 1946, less than 800,000 tons were dried. The next year, more than 1,200,000 tons of grapes were used for drying. Purchases by government have in some measure mitigated the effects of peak years -- the impact of which was worsened by loss of traditional export outlets. Little can be done to avoid the possible dangers of very short production which might be induced by high wine prices. Within the last decade, less than sixty per cent of the harvested annual production of raisin variety grapes has been dried on four occasions. In one year, more than ninety per cent was dried. Appendix Chart 21 shows the changes in utilization of raisin grapes as a percentage of harvested production. The violence of shifts since the war has been far greater than in the decade 1930-39. There is also an apparent drift towards using a smaller percentage of the larger crop in the dried outlet. These drastic changes impose a heavy strain on marketing -- although it is possible that they are in fact due in part to loss of markets. The strain, however, is not confined to raisins alone since the same erratic change in supplies in the other outlets may be generated with these fluctuations in utilization for drying.

Figure 21 also shows the striking year-to-year changes in use of raisin-variety grapes for juice. In 1946, more than 700,000 tons of raisin grapes went to wineries. In 1949, it appears that less than 200,000 tons were so used. The tonnage used for juice varied sharply from year to year prior to the war. However, the fluctuations were less sharp and the percentage used for wine much lower in pre-war years. Since 1940 more than thirty per cent of raisin grapes

Fig. 23. U.S. Per Capita Consumption of Raisins and Currants, in pounds Processed Dry Weight, 1921-1948, Years Beginning September 1



were used in four years. Last year it appears that less than fifteen per cent of the crop of raisin grapes went to wineries. It is apparent that there is a perverse alternation in flooding and then possibly in shorting the two major markets to which this multiple-use grape has long gone.

There has been a slow but steady rise in the use of raisin-type grapes in the fresh market. This outlet does not show the pattern of fluctuation which alternately overloads and shorts the other markets. In recent years, the percentage of these grapes going to fresh markets has been climbing towards ten. The fresh-for-juice channel is of little commercial significance for the raisin variety producers as a whole. Small amounts are canned.

California normally has turned out well over half the raisin production of the world. Figure 22 indicates both that California production is highly variable and that its variability is impressed upon the series representing total world supply. Loss of exports -- which like other phases of merchandising is not considered here -- has greatly compounded the problems of the raisin branch. It is a further reason for concentration by the government of its subsidy operations in this segment.

There has been a long-time trend downwards in per-capita consumption of raisins in the United States. From a peak of about 2.9 pounds per capita per year, consumption -- excluding relief distribution -- dropped below 2.0 pounds before the war broke out. It appears that per capita consumption since the close of the war has resumed about the same level held prior to its outbreak. The industry has shown acute awareness of these problems and has organized a variety of programs discussed in Section III of this report.

Fig. 24. California Harvested Production and Utilization of Table Grape Varieties 1927 - 1949

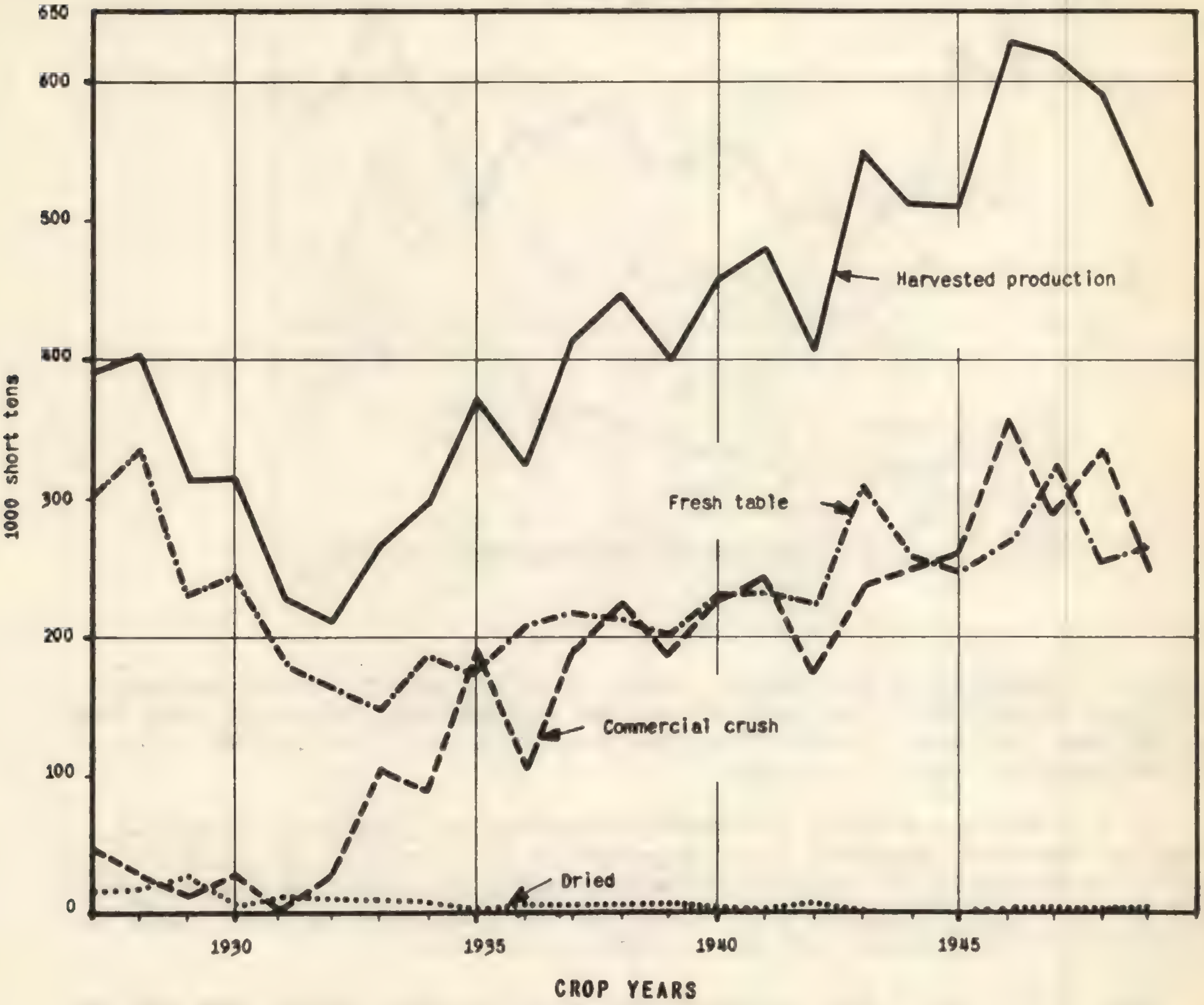
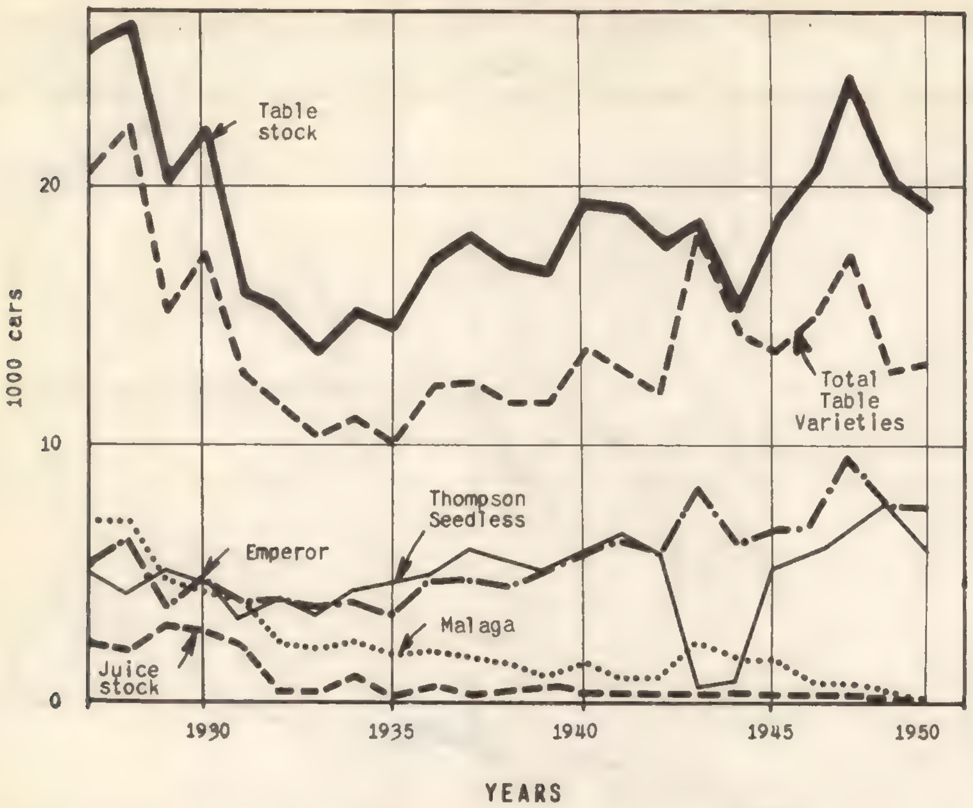


TABLE GRAPES: Harvested production increased at a faster rate from 1932 through 1946 than did either the wine varieties or raisin grapes. A little more than 200,000 tons were harvested in 1931; in 1946 about 650,000 tons had been harvested. The rate of increase was greatest here, but the fluctuations from one year to the next appear to be of a lesser order than in the other two segments. In the last three years, production has fallen off more than 100,000 tons per year. This represents almost wholly a decrease in yield per acre since there have been no important changes in the bearing acreage of these varieties.

There are only two important uses for table variety grapes. Fresh table use and commercial crush account for almost exactly equal parts of the crop. A very small tonnage is dried, although this very minor utilization appears to be disappearing completely. Fresh table use declined during the great depression. Immediately after repeal, the utilization of table-variety grapes in winery channels was greatly expanded and by 1935, the tonnage used in wineries exceeded that sold for table use. Since 1935, winery use has exceeded table use in tons in six years. In recent years, the division has been almost equal. The roughly equal

Fig. 25. California Interstate Rail Shipments of Table Grape Stock, by Varieties, 1927-1949



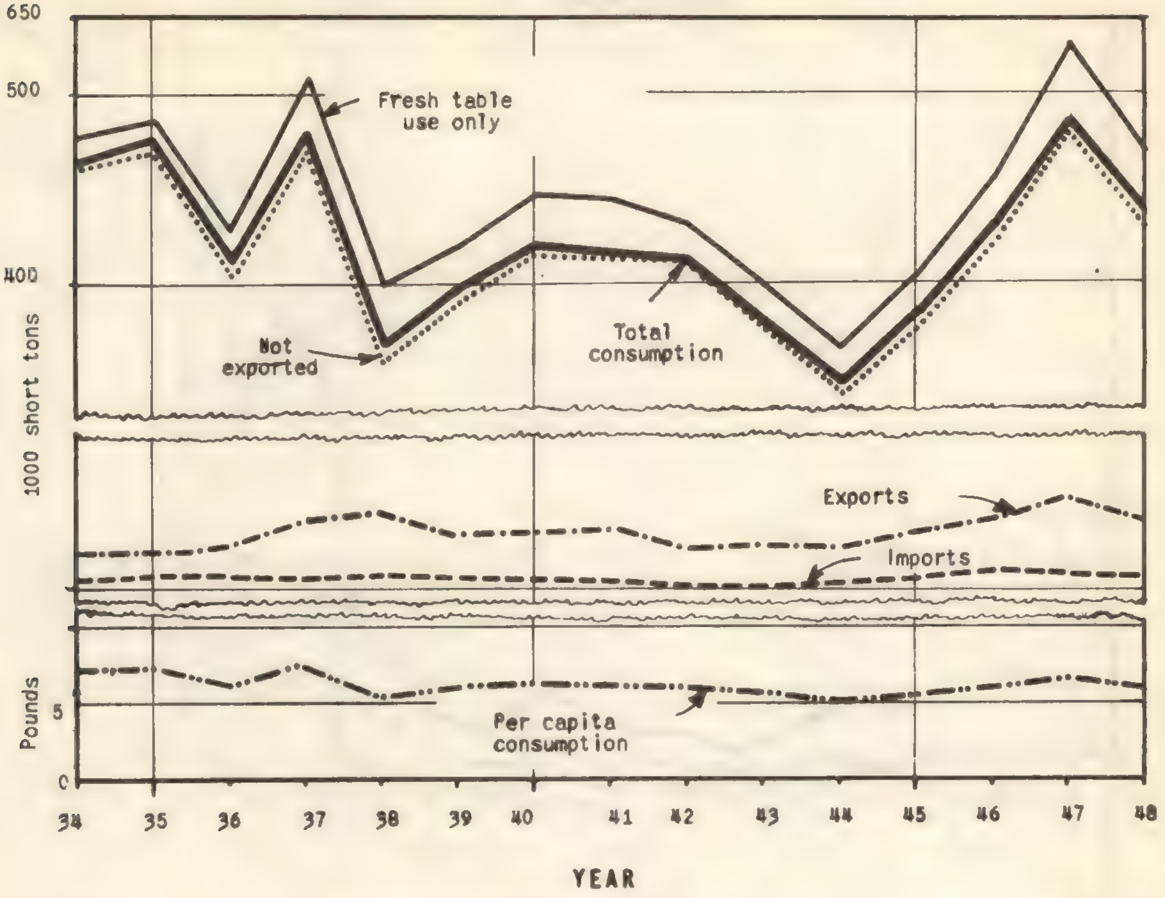
division of table grape utilization between table and winery outlets has been maintained since 1935. Thus both series have consistently increased. Less than 200,000 tons were used in each of the two outlets in 1935, but by 1946 it had climbed to about 300,000 tons each.

As a percentage of total harvested production, utilization in commercial crush has exceeded interstate fresh shipments in all years but two since 1937. Interstate shipments for juice and sales for drying are both less than one per cent of the crop. Intrastate fresh sales for table use have declined slowly to a level of about seven per cent of harvested production.

Less than five per cent of Muscats are used for table fruit. Less than ten per cent of the Thompson Seedless harvest is so used, although this is almost as large in tons as the Emperor deal. About thirty per cent of Tokays and about seventy-five per cent of Emperors in recent years have gone to fresh sale for table utilization. For all other table varieties combined, less than forty per cent of harvested production is sold for fresh use.

Sales of fresh grapes in various outlets fluctuate sharply from year to year. Total sales to fresh markets trended downward quite sharply from 1934 through 1943. Then total sales -- which includes all varieties of grapes and also includes uses other than table consumption -- climbed sharply until the downturn of 1948. Sales for fresh-table-use-only dropped from about 475,000 tons in 1934 to about 350,000 in 1944 and before the 1948 break had climbed again to about 525,000 tons. Farm-home use has been quite stable. It is, however, a small outlet and since 1934 has dropped from about 60,000 tons to about 35,000 tons. The home-made wine market is the second most important channel in

Fig. 26. U.S. Per Capita Consumption and Distribution of Fresh Grapes as Table Fruit, 1934-1949

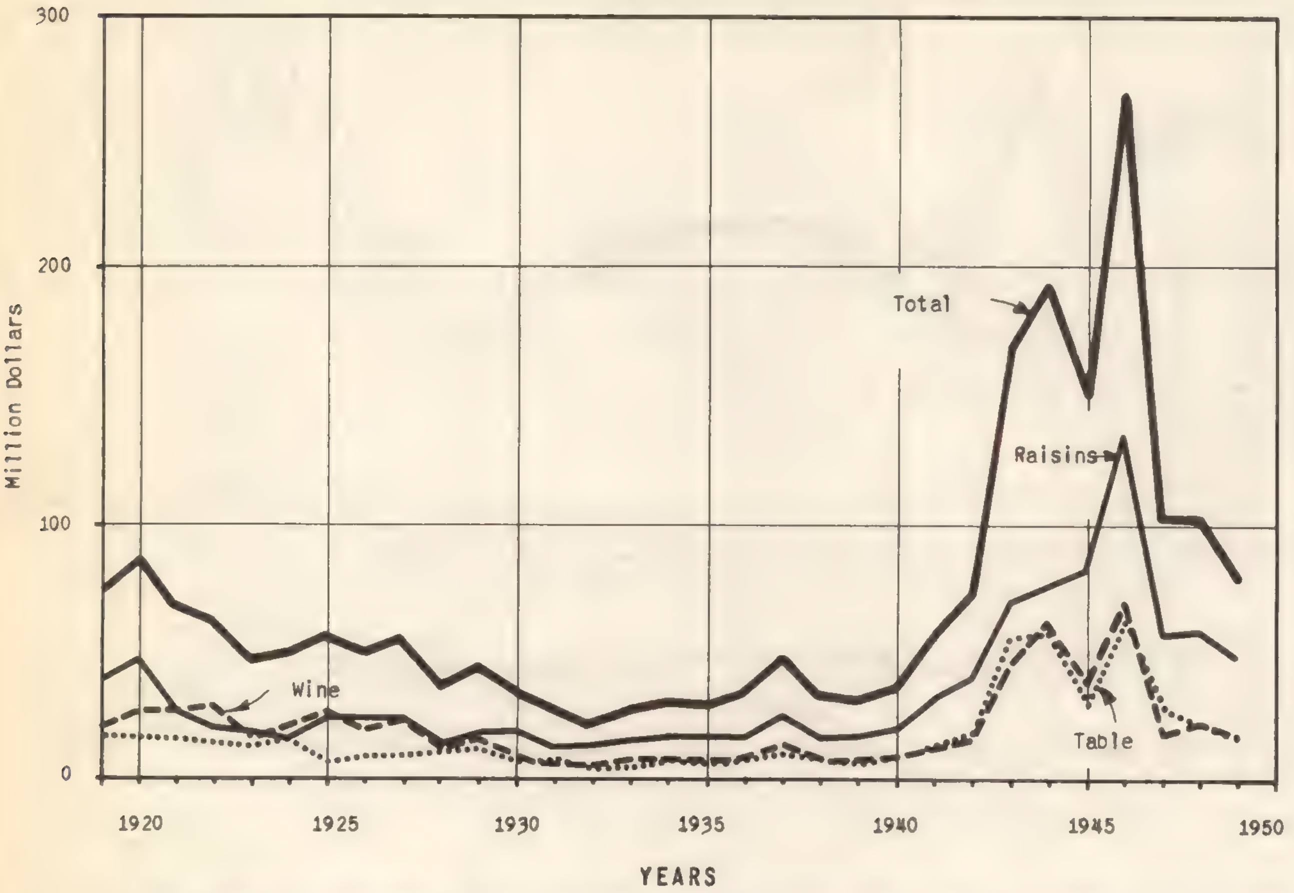


which fresh grapes are moved. The sharp drop in 1943 to less than 100,000 tons of fresh grapes for juice purposes was largely due to war-time shortage of transport facilities. However, prior to the war, there was a long-run trend down in such shipments. The same trend seems to have been renewed since the war ended, with shipments in recent years at less than 150,000 tons.

Neither exports nor imports of fresh grapes as table fruit have attained great commercial volume. Exports are still less than 50,000 tons and imports have thus far not reached even 20,000 tons per year. The Federal Department of Agriculture has not yet undertaken to subsidize foreign movement of fresh grapes.

Total consumption as table fruit declined moderately for ten years prior to 1944. There followed three successive years of sharply increasing movement involving an increase in annual utilization from less than 350,000 tons in 1944 to nearly 500,000 tons in 1947. Consumption again fell below 450,000 tons in 1948. It is of course quite impossible directly to compare movements of grapes in the various channels by tonnage alone since widely differing amounts of processing, transportation, services and packaging are involved among the various uses. However, United States per capita consumption of fresh grapes for table fruit has not increased over many years. From about seven pounds per capita in 1934, there was a slow drop to about five pounds per capita per year in 1944 and then a slow rise to 1947. Fresh table use is the smallest of the three major outlets in terms of per capita use of fresh grapes, although as noted above the rates of consumption in the different uses are not easily compared. Nearly twenty pounds per year per person are consumed as wine.

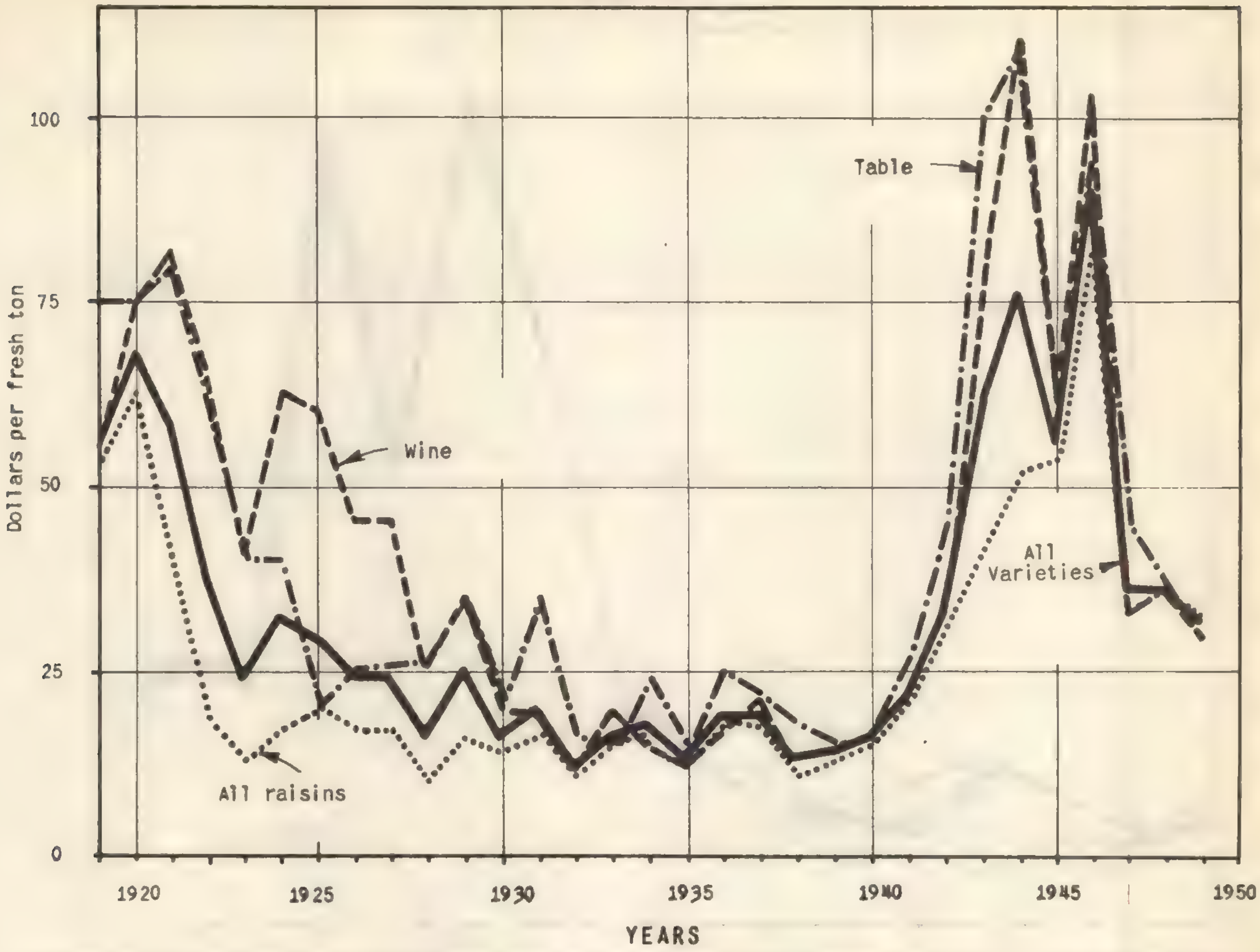
Fig. 27. Growers' Total Returns for California Grapes by Varietal Classes
1919 - 1949



PRICES AND RETURNS: One measure of the health of the various grape industries is the level of price as compared to prices in other fields and to the costs of things used by grape producers. Similarly, total returns to growers or to other groups who participate in the processing or production of grape products would be a useful index. Thus far it has not been readily possible to calculate either total or net receipts at any stage other than at growers point of first returns. In view of the large number of different kinds of buyers of grapes it would be expected that changes in the relative profitability of grape enterprises would soon be shown by similar changes in prices and returns to grape growers. On this assumption, Figure 27 may be taken to indicate the general drift of returns in all branches and at all levels of these interlocked industries. The near-identity of changes in prices by varietal class, by variety, and by utilization support the validity of this reasoning.

At the end of World War I, the farm value of grape production in California was about seventy-five million dollars. The peak was reached in 1920 at a little less than ninety million dollars. Then followed the long slow decline — a sort of a creeping and protracted depression when the rest of the economy was in boom. In 1932, total returns were less than $25 millions. The climb during the war was phenomenally fast, far exceeding the rise in the first war. Returns went nearly to $200 millions in 1944 and then broke but recovered in 1946 and climbed to the astronomical level of more than $260 millions. Then in one year, returns fell more than sixty per cent from the 1946 peak to just about $100,000,000. There was another slight break in 1948 and a further decline in 1949 to a value of about $80,000,000. This is the "grape problem." It is also the "raisin problem"

Fig. 28. Farm Prices of California Grapes by Varietal Classes 1919 - 1949



and the "wine problem." These price and income falls occurred in the face of elimination of up to nearly 500,000 tons of grapes in one year through government purchase of raisins.

It was shown in the analysis of acreage as a determinant of production, that the acreage in California grapes as a whole, and also when considered by varietal classes, by districts and even by most varieties has been remarkably constant. Thus Figure 27 also indicates roughly the relative changes in income per acre from grapes as a whole and by varietal classes. It cannot be taken to indicate net incomes since the input of other factors per acre of land seems to have varied widely over the years. These violent changes in level of total receipts and even the long depression of income prior to the war are not unique to these industries. They are nonetheless generally agreed to be undesirable especially in those areas in which the grape industries are the major sources of community income. The basic objectives of the integrated series of grape programs discussed in Section III should be to make it possible for grape producers, processors and handlers to earn incomes of a desirable level and reasonably free of the sharp fluctuations which have occurred in the past.

Since 1925, total receipts from raisins have exceeded receipts from either wine or table grapes, and the differential appears to have widened in recent years. The returns to growers at first delivery point from wine grapes and from

Fig. 29. California Wine Grape Varieties: Returns to Growers Per Ton by Type of Utilization, 1934-1949

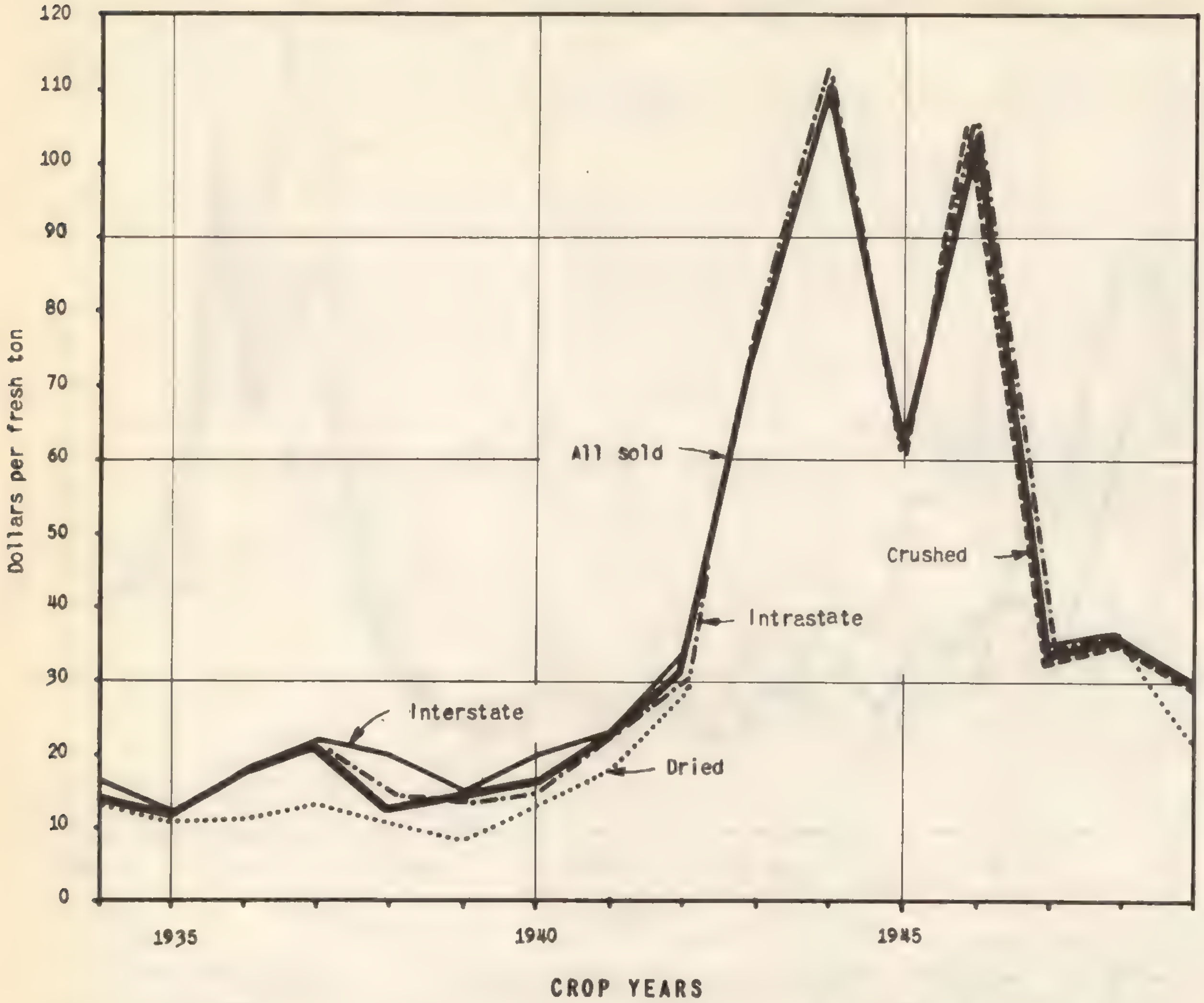
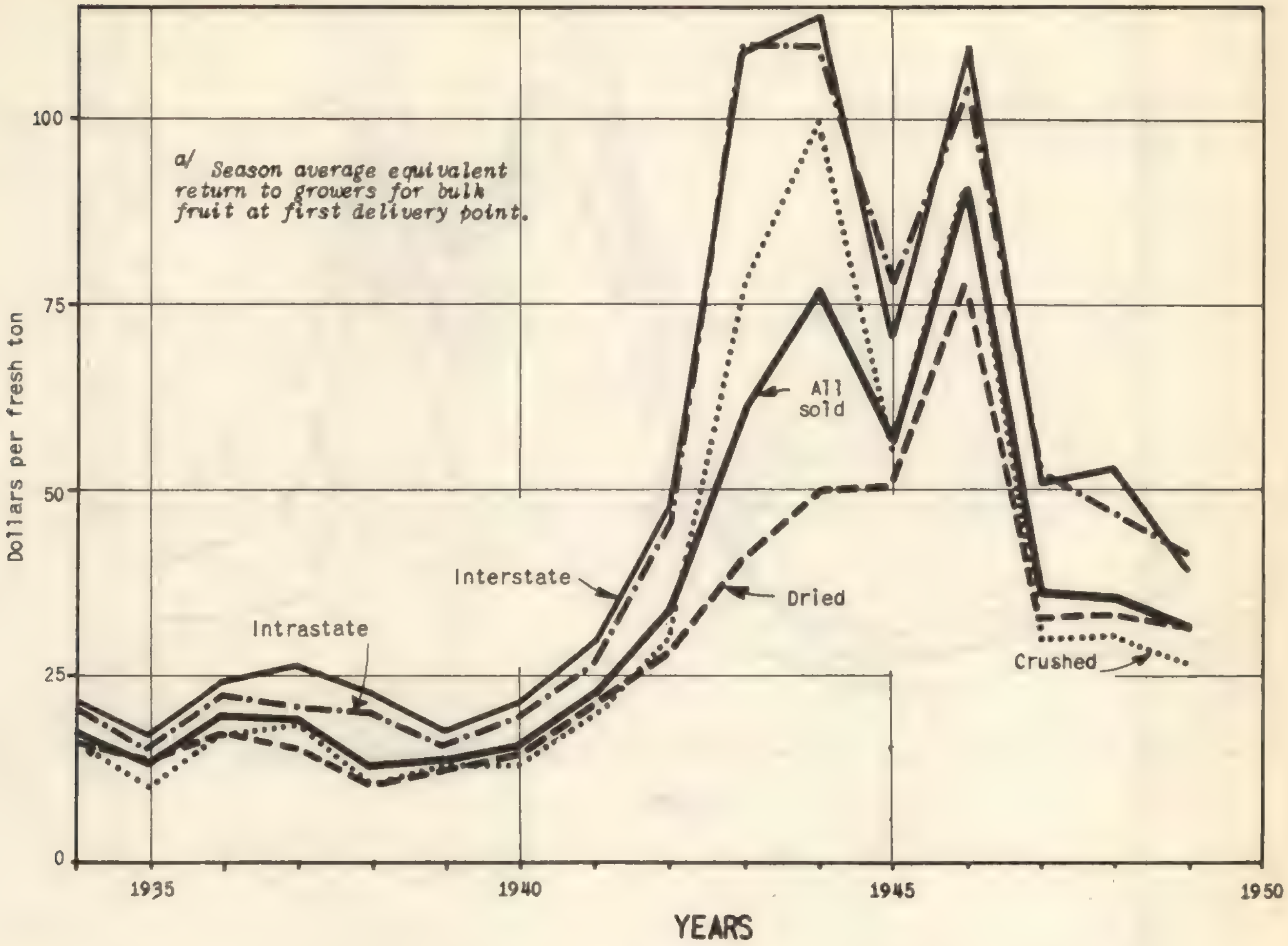


table grapes appear to have been almost equal for nearly twenty years. Since acreage of the two types is different, as is yield per acre, the gross receipts per acre from table grapes are larger. Costs are also larger in growing table grapes. Bases for calculating net incomes are not presently available without considerable further study. There is a close similarity in the behavior of the total returns series for the three varietal classes over the last twenty years.

By the time of repeal, which coincided with the first recovery stages in the great depression, the prices of the three varietal classes oscillated closely together. Prior to repeal, the advantage in price for wine grapes ranged from $25 to $40 per ton. Since then there has been only one marked deviation from near-identity among the three series. Prices of some raisin grapes during the war years 1943 and 1944, when free play of the market was impeded by government pricing, did not rise to the boom levels reached by wine and table varieties. The peak in 1944 took prices of the wine and table varieties into the neighborhood of $110 per ton. These prices broke again sharply in 1945 but recovered to the level of about $100 per ton in 1946. Raisin prices rose with the others in this second rise. Then the large crop of 1946, which mainly reflected itself in swollen inventories of wine, made its effects upon growers apparent in 1947. In the one year, prices on the average crashed about $55 per ton to the level of $35 per

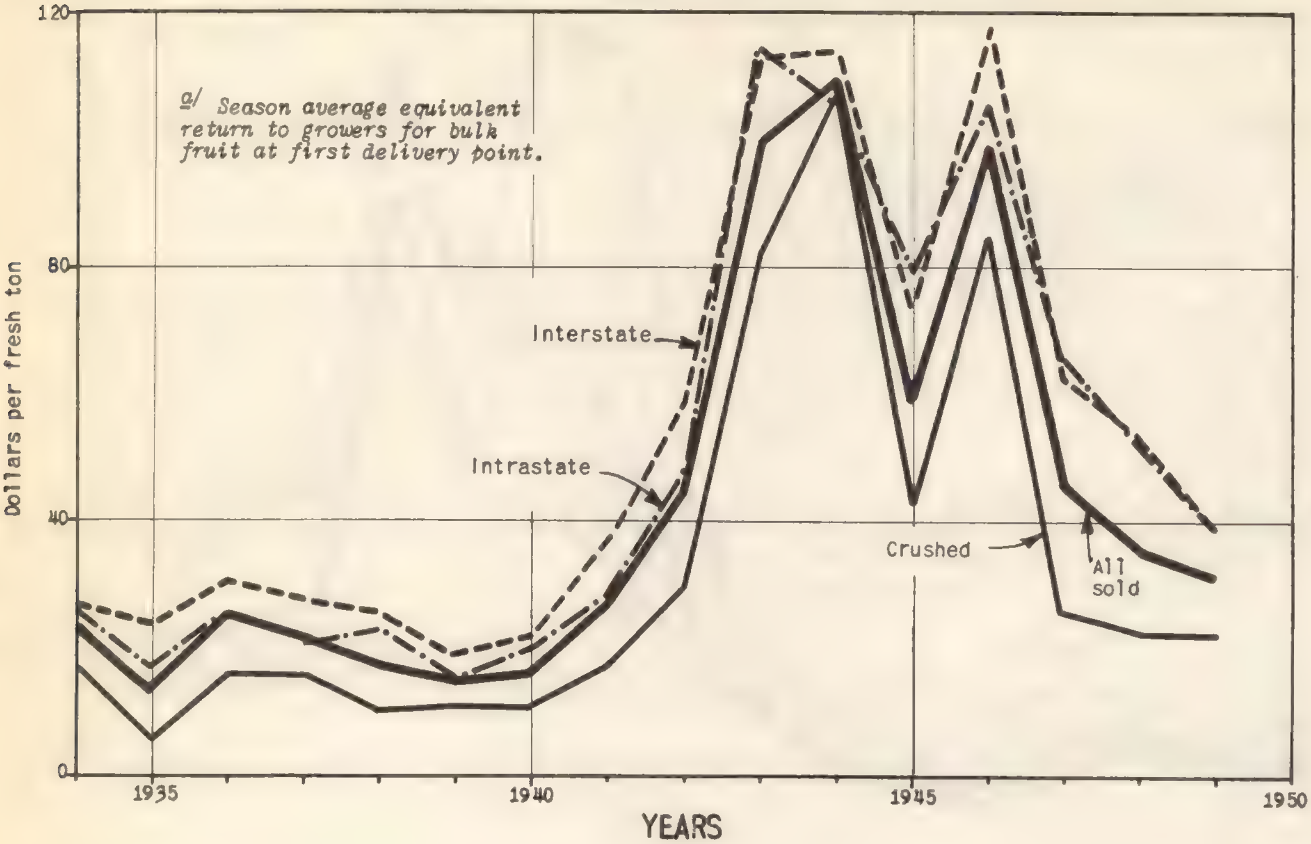
Fig. 30. California Raisin Grape Varieties: Returns[a] to Growers Per Ton By Type of Utilization, 1934 - 1949



ton. Prices to growers also fell slightly in 1948 and again in 1949. These price falls affected all varietal classes. The closeness of variation in all of them is testimony to the fact that grapes may be used for many different purposes. If the prices in different utilizations differ by more than the cost of getting the grapes from the lower priced to the higher priced outlet, such a shift will occur and will continue until net prices on the vine are equalized from all possible channels into which the grape may go. Thus a short crop of wine grapes -- the single varietal class with only one major use, -- or a rise in wine demand, would lead to a rise in price for the other two varietal classes. A heavy crop or low demand for wine -- as witness 1947 -- will lead to a fall in prices of all grapes. The same conclusions are applicable to the effects of a change in either supply or market conditions for raisin or table varieties.

The close similarity of price behavior among the three varietal classes is due to the fact that all of them to some degree and some of them to a great degree may be used in several outlets. Therefore when the prices received on the average for the various channels are compared by varietal class, the logically expected close relationship shows up.

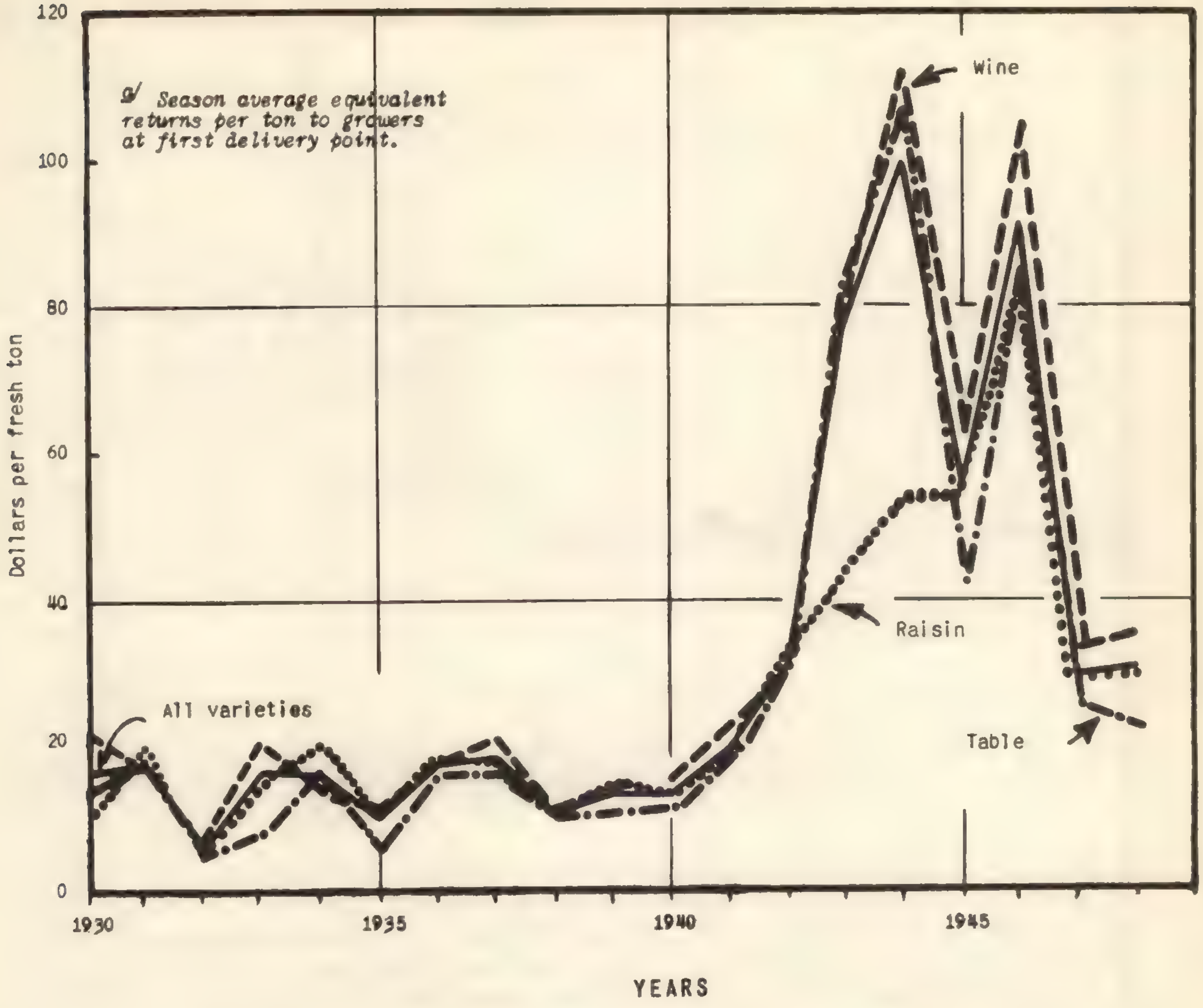
Fig. 31. Table Varieties, California Grapes, Returns to Growers[a] Per Ton By Type of Utilization, 1934 - 1949



Wine grapes are now sold mainly for crushing and the only other large outlet is interstate shipment for juice. The average prices received at first delivery point are almost the same at every year. This means that wine-grape growers decide where and how much to move into each outlet by the same criteria used by any merchant of any product which has multiple uses. He will divert to whichever channel shows the higher on-vine value per ton. Such diversion will increase the supply and therefore bring down the price and that outlet. At the same time it will shorten the supply and raise the price in the outlets from which the diverted fruit is drawn. This process is profitable only so long as the price differences between alternative outlets exceed the differential costs associated with sale in the alternative outlets.

The season average returns to growers of raisin-variety grapes when expressed in terms of dollars per fresh ton at grower's first delivery point show not quite so close a relation among the different outlets as do wine grapes. This may be due to the fact that packing and selling costs up to the first delivery point are quite different for interstate or intrastate fresh shipment for table use as opposed either to laying on trays for raisins or delivery to a winery for crushing. Aside from the price-control years, there are fairly stable differentials among the alternative channels of use. This indicates that the expected equalization of on-vine price probably occurred. Were it not to occur, it would be necessary either to assume that growers were unaware of price differentials or were unable to capitalize upon them -- which may have been true under price control. Average returns to growers of all grapes have been about the same as those received for raisins in the past three years. Government purchase of raisins may be assumed to achieve its objective of stabilizing returns to growers in all the segments

Fig. 32. Prices [a] of California Grapes, by Varietal Class, Crushed For Wine and Brandy, 1930-1949



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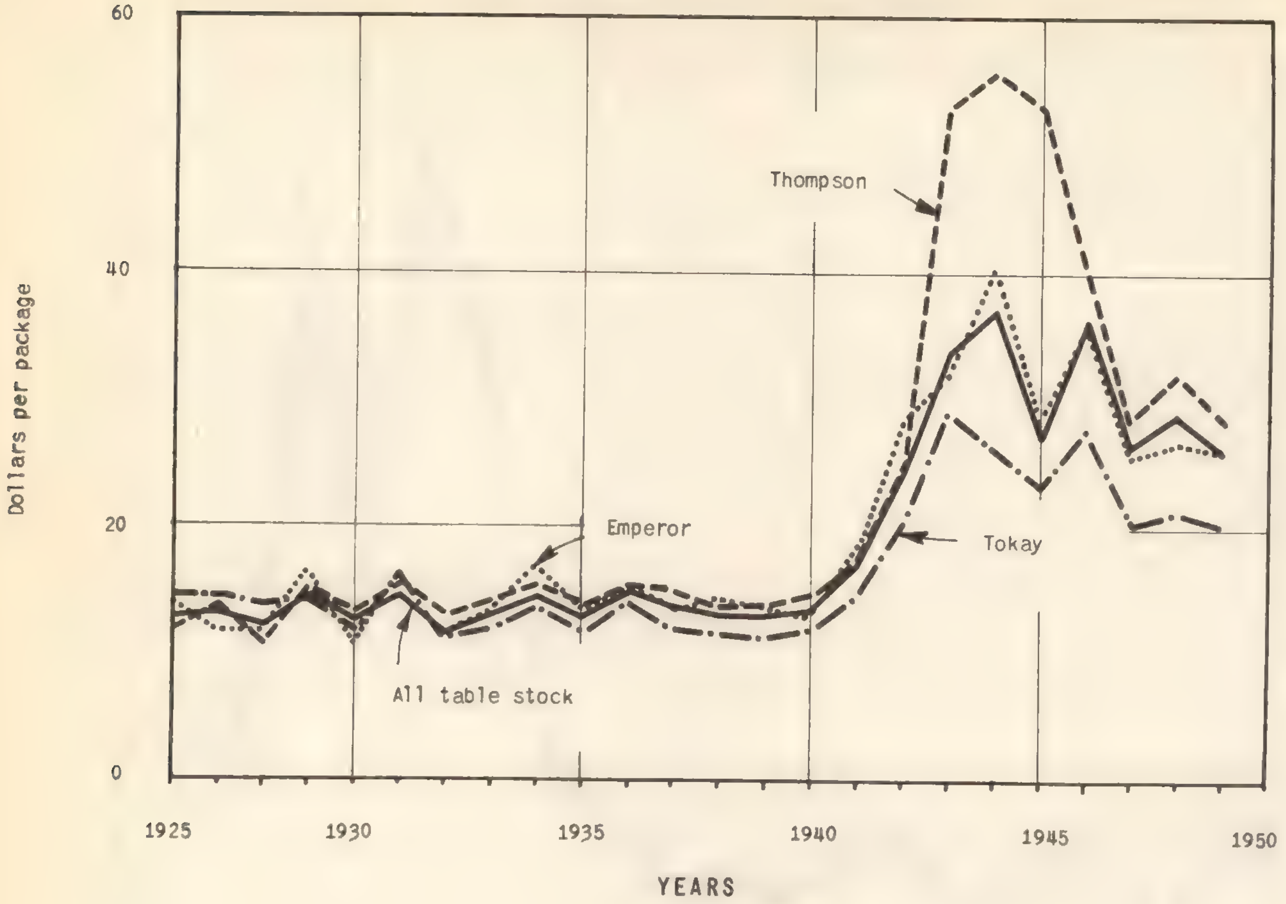
since the interrelationship of prices is so clear. It is not certain by any means however that benefits are equally distributed throughout the industry. The raisin-grape series also indicates that price and income fluctuations have been excessively violent in all segments. They indicate further that depression in one segment means depression in the other two. The break in wine-grape prices in 1947 after the stuffing of inventories in 1946 was similar in all arms of the grape industries.

The behavior of prices in the table grape segment is much like that in raisin-grapes. There are fairly stable differentials in prices to growers from the various outlets, probably representing the fairly stable differences in costs to growers of entering the alternative channels. It is probable that subtraction of the costs directly associated with sale in each specific channel would yield almost equal prices on the vine for all parts of the total supply. The general pattern of fluctuation in all table-grape prices is quite similar to the other two classes. Prices at first delivery point have declined somewhat less than prices for grape products involving less expense in packing and packaging. However, the prices for table grapes crushed for juice have broken to the same low levels prevailing elsewhere, and the average price for all uses is about the same as the average for the other two segments.

Fig. 33. EASTERN DELIVERED AUCTION PRICES PER PACKAGE OF CALIFORNIA TABLE STOCK GRAPES BY CHIEF VARIETIES, 1926-1949



Figures 32 and 33 show a different aspect of the close interrelationship of different elements in these industries. Here the question asked is: for a given utilization of grapes, how are the prices of different varietal classes or varieties tied together?

Grapes crushed for wine or brandy yield -- and have yielded since seasons prior to repeal -- about the same price per ton whether they be raisin, wine or table varieties. So far as this outlet is concerned, the long-established utilization of such grapes as Tokays and Muscats for wine and Thompsons for fresh table shipments makes precise or exclusive classifications impossible. The single marked deviation appears to be the war period when unusually heavy production of raisins, relative to tonnage used in other channels, occurred as a war phenomenon. The same heavy use of seedless grapes for raisins appears to have shorted them in the table grape market. For those same years are the ones when Thompson shipments for fresh table use almost disappeared and prices of Thompson grapes for this use rose high relative to other table shipments. On the whole, grape prices for winery or distillery use are identical. This means either that growers and vintners are irrational in distributing the crop, or that over the wine industry as a whole the varietal classes are almost perfectly substitutable. Figure 33 indicates that eastern prices for table stock are closely tied together.

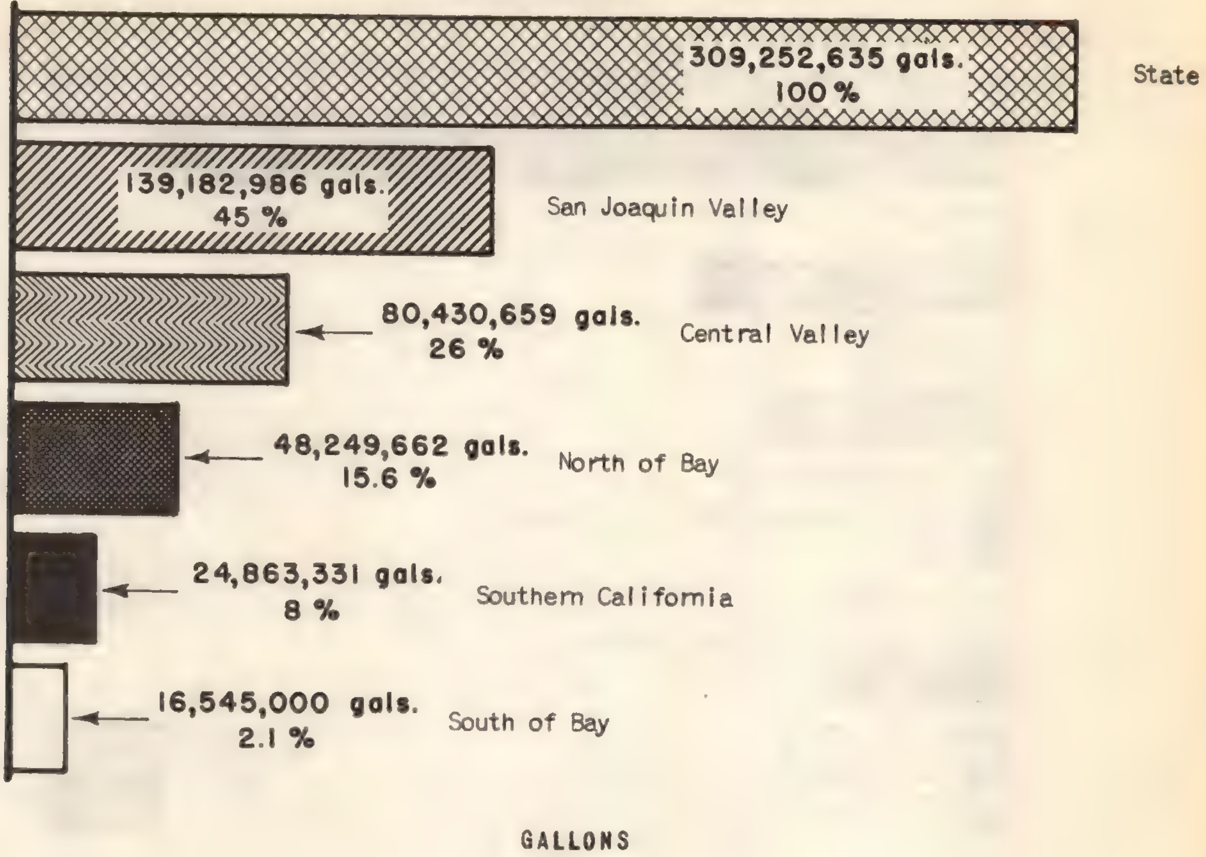
Regardless then of how the price and returns picture is regarded in these industries, the same conclusion seems to appear. For better or for worse, the grape industry is a single industry composed of several closely related parts.

There may be little immediate market competition among the products of grapes. That is to say, a heavy wine inventory in any season may not affect the willingness of consumers to pay for a given supply of raisin or table grapes. Lost export markets, withdrawn government supports or other factors which might slow down trade movement of raisins would probably have little effect upon the demand in that season for wine or for table grapes. And were weather or heavy sales of competing goods or any other factor affecting fresh table sales -- excepting a drop in consumer buying power which is probably common to all markets -- to result in lowered demands for table grapes, the other two main channels should not immediately suffer. But were any of these situations to occur, the other two would suffer its effects in the next production period, just as raisin and table grape prices broke in 1947 after wine inventories were flooded in the bumper year of 1946. Since the same raw materials may be used in a large measure for both dessert and table wines, the same price behavior should be expected. This is not idle theorizing. Look back over the last seven charts and note that returns and prices in all sectors change almost identically. So long as growers are able to estimate the prices which they can get for grapes in the various uses, they will all aim at the uses in which expected price on the vine is highest. By so aiming, they will bring down the higher prices as supplies sent into those uses go up and by the same token raise the prices in the channels from which the grapes are diverted. The process should -- and it most obviously has -- continue until field prices run about the same for all kinds of uses for given grapes. It is therefore not wise to assume that because there is no immediate market substitution among the different uses, no relation exists among the industries. It is wrong to assume that because in any use the grapes of different varieties are not perfectly substitutable technically, a change in supply or price will not affect all grapes going into that use. If grapes are technically substitutable at all, a change in one segment will affect all others. And this has clearly been the case. Vintners would not pay the same average prices per ton for all varietal classes if they were not on the average technically identical in terms of commercial production.

In terms of industry organization, this interrelationship among grape uses on the production side means that no program should be set up which does not provide methods to regard adjustments made or contemplated in other parts of the industry. There are legal and administrative limitations upon the scope of the various programs which may be undertaken. Growers, processors and handlers must operate within these legal limitations and they must also regard the history which lies behind this industry. They are all faced with the same three problems; without any increase in acreage, there has been and may continue to be a steady increase in aggregate production in all three varietal classes; without any correlation to changes in market demand, growers must expect sharp changes in output from year to year; grapes are highly substitutable as raw products for many different uses and a change in demand or production in any segment will therefore have much the same effects upon all kinds of grapes in all kinds of uses. Growers, processors and handlers should therefore realize that there is no solution of any of these three problems in any segment of the industry unless there is a simultaneous solution in the other two.

Wine inventories in 1950 should be light and the large surplus pool of raisins will probably have been eliminated through the diversion and subsidy agreement with the federal government. Unless total production reverses the drift of the past three years and resumes its long upward trend, there should be no further distress this season in this industry in which grape prices have broken from $100 to $30 since 1947. However, it is possible that wineries again may assume a heavier-than-desirable portion of total production in an effort to rebuild inventories. The raisin market could in fact conceivably be shorted in such a process. The industries must therefore consider the allocation of supplies among the three main channels as a matter of self interest to all groups. Government may aid in eliminating surplus raisin stocks; but an excessively large crush in 1950 would not be eliminated by government purchase and prices of grapes and wine might both suffer from unsold wine inventories in 1951.

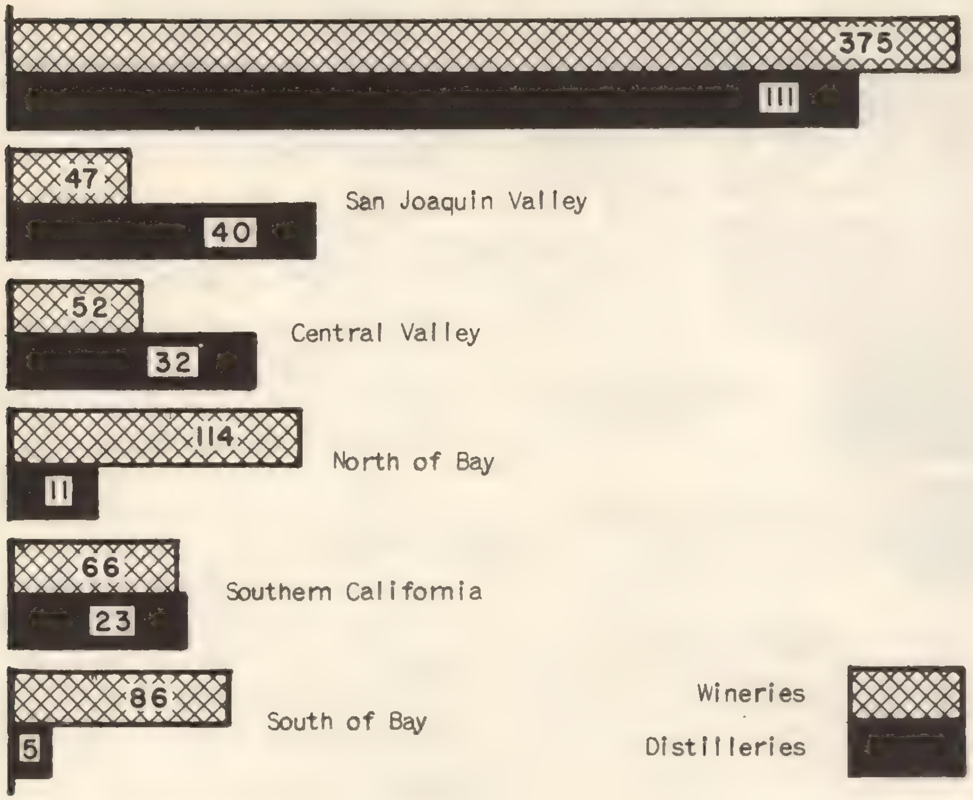
Fig. 34. Average Storage Cooperage as of December 31, 1947-1949
By Districts



WINE PRODUCTION: The California wine industry now has a storage capacity, including fermenters, for more than 300,000,000 gallons of wine. In the San Joaquin Valley District alone there are nearly 140,000,000 gallons or 45 per cent of the total cooperage in the State. The Central Valley District can store more than 80 million gallons which is more than a quarter of the state's storage facilities. Together the districts comprising the Interior Valley thus maintain more than 70 per cent of the storage capacity in the wine industry. A little less than 50 million gallons may be stored in the North Bay region of the Central Coast area. Including the South Bay area, the Central Coast District accounts for about 18 per cent of capacity. With 25 million gallons and 8 per cent of capacity, Southern California is the other important area in the production of wine.

There were 375 active bonded wineries in the state in 1949 and 111 fruit distilleries. The geographic pattern of winery-location differs sharply from the geographic distribution of storage cooperage. Storage cooperage is heaviest in San Joaquin and Fresno Counties. Wineries are concentrated in Napa ahd Sonoma Counties in the North Bay area of the Central Coast. There is also a heavy concentration in Santa Clara County, and wineries are fairly numerous in Contra Costa and Alameda Counties. In the Interior Valley, the wineries -- like the storage capacity -- are localized in Fresno and San Joaquin Counties. However, as a fraction of storage capacity, the number of wineries is much less in these districts than on the coast. This of course means a far larger capacity per winery in the Interior Valley districts than on the Central Coast. The fruit distilleries are most heavily localized in the Interior Valley. Scale of operations therefore differ widely among regions of the state.

Fig. 35. Active Bonded Wineries and Fruit Distilleries By Districts, 1949

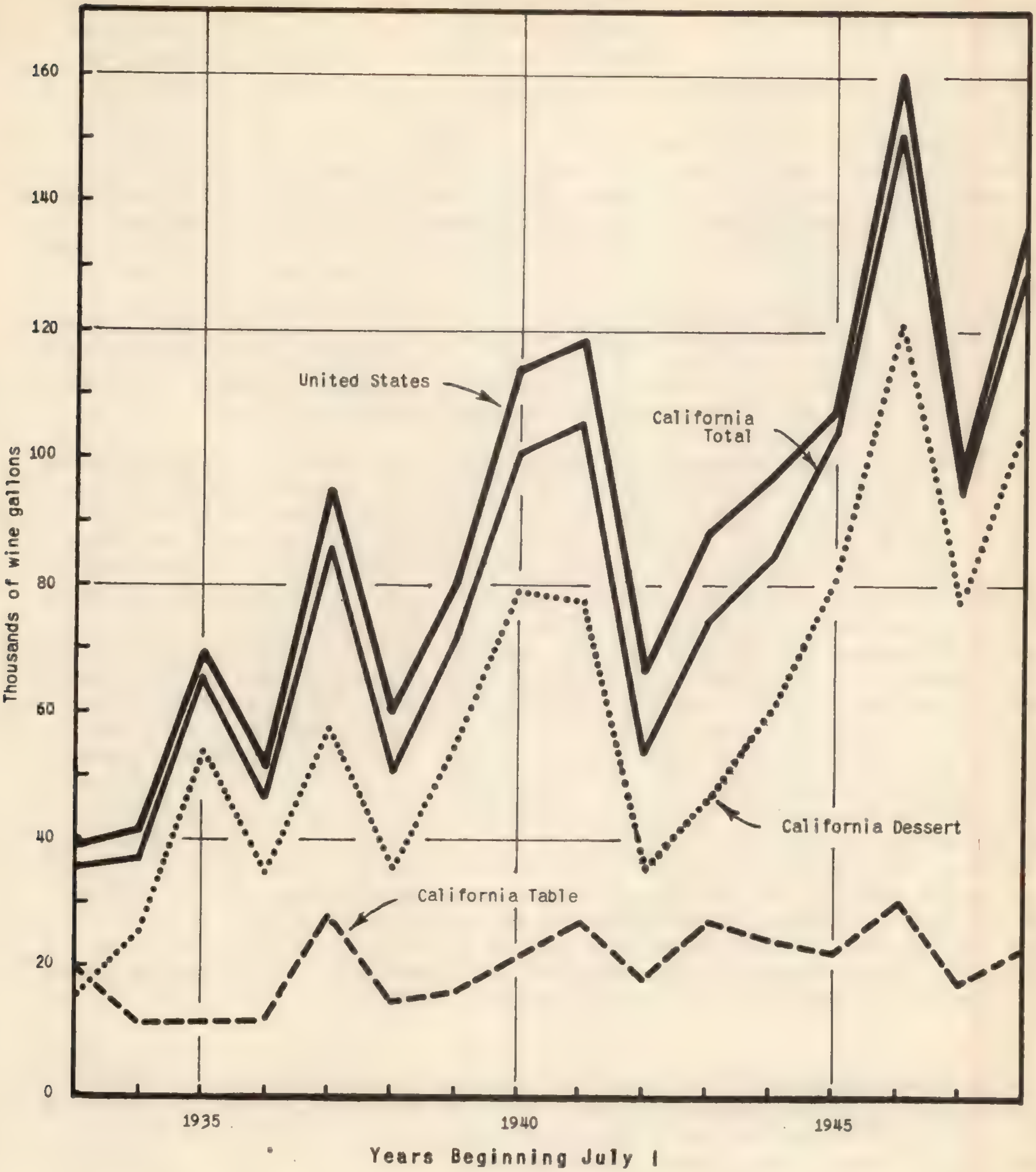


There has been a continuous trend downward in the number of active bonded wineries. This has occurred in the face of a continuous rise in storage cooperage and in annual production. The tendency towards large scale operations appears to have been most striking in the Interior Valley area.

NET FINISHED PRODUCTION: Total net finished production of wine in the United States, as shown in Figure 36 for years beginning on July 1st, has climbed upwards at a remarkable rate since the repeal of the Prohibition amendment and laws. The rate of increase has been almost linear, or with nearly equal gains per year in gallons over all years of the period 1933-1948. The rising trend was interrupted by the war but it seems to have been resumed at about the same level and the same rate of increase as prevailed before the war broke out. The maximum production was reached in 1946 with more than 160,000,000 gallons of wine finished. Since the end of the war, the proportion of total net finished production made in California has greatly increased. From the view of the entire wine industry, extra-California production has become a minute fraction of the total United States output.

The California table wine industry accounts for roughly one-fifth of the total wine output. The rate and the amount of increase in gallons have been very small compared to dessert wine. Net finished production of commercial table wine has fluctuated near a level of 25,000,000 gallons yearly, with a very slight upward trend apparent over the years since repeal. The war seems to have had no effect upon the general pattern of production in table wines.

Fig. 36. United States and California Net Finished Commercial Wine Production 1933 — 1948



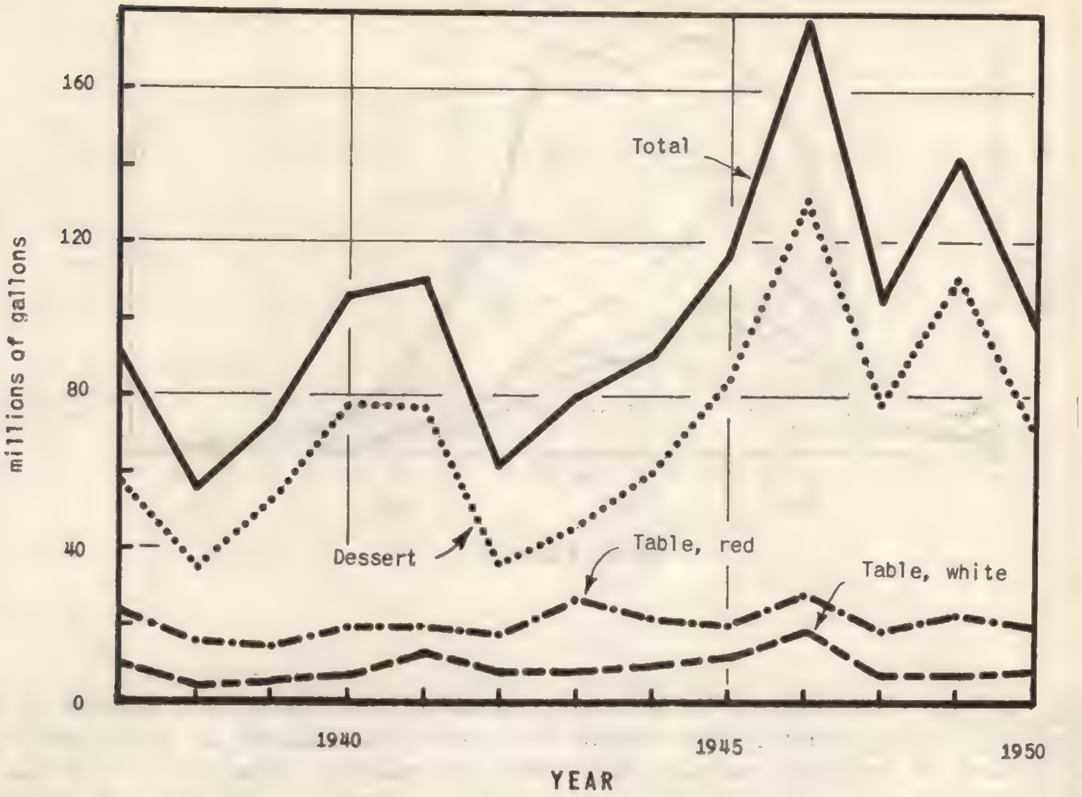
Net finished production of dessert wines in California has risen meteorically since 1933. Starting with less than 40,000,000 gallons produced in 1933, more than 120,000,000 gallons were produced in 1946. Except for the war years, when disposition of grapes was partly determined by government decision, the rise has been generally linear or about the same number of gallons increase per year regardless of the year within the period 1933-1948. Except for the war years, which of course are not directly comparable with other parts of this period, there is a marked tendency for alternate years of high and low net finished production. The same tendency appears in the table wine series but to a lesser degree, and it is made less striking by the lower scale of that series. Net finished production of dessert wines often differed by as much as 20,000,000 gallons from one year to the next before the war. Production of dessert wines dropped by more than 40,000,000 gallons in 1947 as compared to 1946. These sharp changes were not exclusively due to changes in market outlook. They were of course related to the upward trend in total production of all grapes in California over these years. There was probably considerable relationship to the year-to-year fluctuations in output of grapes. But it is probable that a more important determinant of these erratic variations in production -- which be it recalled were shown to have existed in the raisin segment also -- was the market-outlook in either or both of the other two main segments of the industries. There is an almost systematic pattern of utilization shown in Figure 15 whereby utilization of grapes varies, with a high year in wine and a low in raisins followed by the reverse. The year-to-year changes in utilization in these segments often exceeded the changes in total production of grapes over the same year.

Total net finished production of commercial still wines in California shows much the same characteristics as its major component -- dessert wines. Partly as a result of production conditions, market outlook or government policy in other parts of the industry, the total amount produced and therefore required to be marketed in each year varied sharply. Other industries -- particularly the perennials -- are subjected to annual fluctuations in output which are unforeseeable, uncontrollable and often unrelated to changes in market demand. The grape industries are subject to these hazards, but there are two differences. In these grape industries, total production is traditionally used in full even if part is rendered unfit by weather or other damage for the channel to which it was originally intended and even if sale of the total produced supply breaks the price for grapes in all outlets down to only a little more than the costs of harvesting and getting them to the outlet. Second, the total supply which sometimes descends upon any one of the segments may be largely determined by actual production conditions or expected market conditions in another segment. As a result, total production before the war has changed by more than 45,000,000 gallons in one year and by more than 55,000,000 gallons in one year since the end of the war. Storage and re-processing may mitigate the impact of these changes to some extent, but inventories may be drastically affected by price breaks due to sharp and unforeseen increases in production. The price of grapes for all channels is affected in the next harvest season.

The series representing gross production during the harvest season in each year -- as shown in Figure 37 -- even more clearly illustrates the impact of production and of market outlook in other parts of the grape industries upon the crush. Both the dessert and table wine series in gross production during the months July to December are larger than net production in the same calendar year. This is probably due in part to distillation as a phase of fortifying dessert wines and to other factors.

The relative importance of the different parts of the still wine supply is shown also in Figure 37. The table white wine series shows a very minor long-run rise in total production. Relative to its height, the fluctuations in this series are higher than in table red wines. The drift in table red wine gross production has been slowly upward. The total net production of California table wines appears to be less than the gross production series by roughly the amount of the table white wine series. Neither net nor gross production has increased at the rate attained in dessert wine production. Both the opportunity to store wines and

Fig. 37. California Gross Still Wine Production by Classes During July - December, 1937 – 1948

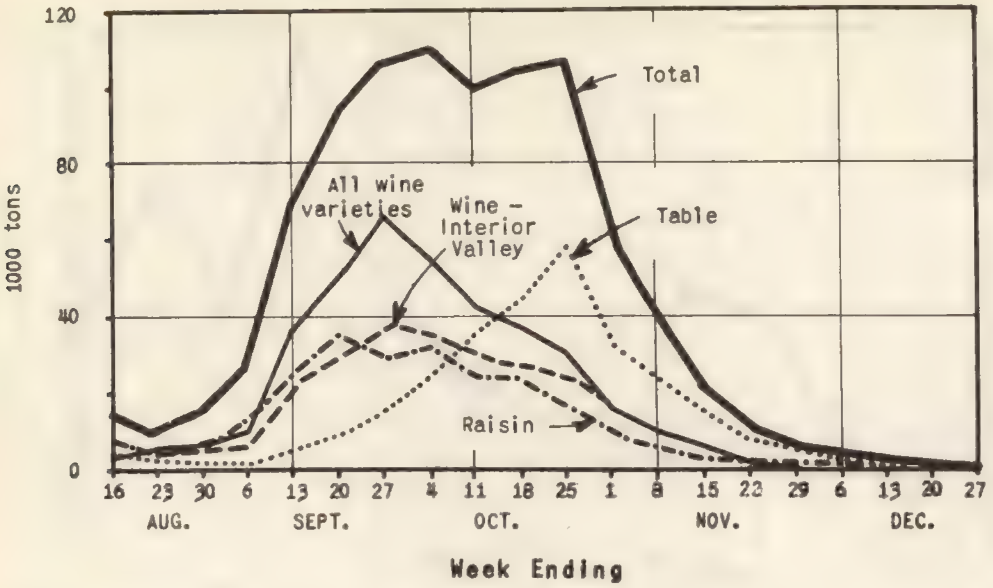


thus to mitigate the violent impact of variable production upon sale, and the opportunity to process gross output into other forms have given the wine industry partial control over its own wine supply if not its raw materials. As a result, the fluctuations in net finished production, while perhaps more violent than desirable, are nonetheless smaller in amplitude than the shifts in gross production. Gross production of dessert wines peaked in 1946 at about 130,000,000 gallons, which exceeded maximum annual gross production before the war by more than 50,000,000 gallons. Since 1946, production has been alternately high and low. 1949 gross dessert wine production was the lowest since the war ended. It is doubtful that a downward trend has started. If the general history of this segment of the industry is repeated, there may be high bidding for grapes in the early part of the 1950 season with another heavy crush as a result.

Taking all types of still wines as a total, the California industry has shown a capacity to crush nearly 180,000,000 gallons of wine in a single season. This occurred in the 1946 season and was followed by a drop to about 105,000,000 gallons in 1947. The pre-war peak gross production was in 1941 with about 110,000,000 gallons. From 1947 through 1949, production has varied from year to year by at least 35,000,000 gallons.

Thus, in summary, the wine segment has successfully marketed a rapidly expanding output over many years. Both storage and processing of gross production into distilled materials for fortification have evened out annual supplies. However, the erratic nature of wine production has by no means been countered by these methods. In the late fall of 1946, prices of bulk wines at the winery broke nearly one dollar per gallon on dessert wines and nearly 70 cents on table wines. This occurred after the size of the 1946 crush became known. It cannot be over-emphasized that average prices of grapes for raisins, table use and for wine all broke in the 1947 season when it became known that purchase of grapes for wine would necessarily be curtailed.

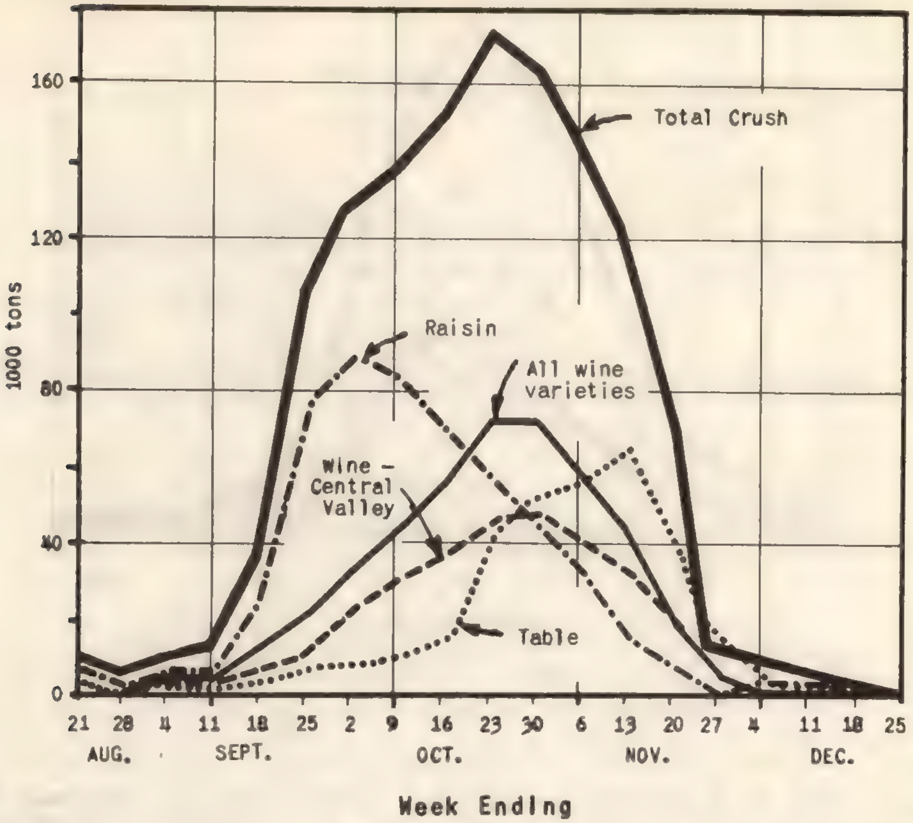
Fig. 38. Grapes Crushed by California Wineries
Weekly 1947 by Varietal Classes



WEEKLY CRUSH: The bulk of crushing in the California winery season is concentrated within approximately ten weeks from early September to mid-November. The time-pattern of crushing varies both with the weather conditions for the season and with the size of the total grape crop. However, by far the bulk of the crush in seasons for which data are available has been handled within about ten weeks. Figures 38, 39 and 40 represent the distribution of tonnage crushed by weeks over the seasons 1947, 1948 and 1949. In all three of these seasons, the same general characteristics appear. Crushing is reported in light volume by mid-August. Some crushing in light tonnage, but not reported by the Market News Service, is believed to be undertaken even earlier. Then after the second week in September the tonnage crushed accelerates sharply and reaches a peak by about the middle of October. By the end of the month of October, the volume delivered to wineries begins to decline rapidly. By the middle of November, the weekly crush has dropped to very low levels. However, reported crushing continues for as much as six weeks -- or up to the Christmas season. In 1950, crushing of 1949 grapes was reported as late as February 12th. The kinds of grapes and their origins by area and varietal type show considerable stability at various parts of the season.

By varietal class, the crushing season seems to differ considerably. Except for extremely small quantities, wine grapes are not delivered to wineries for crushing until the winery season is well under way. The very early-season deliveries are in the main residual to fresh shipping operations. Raisin-variety grapes delivered early in the season are also apparently residual to the same kind of operation. The tonnage of early deliveries prior to the winery season's peak is relatively minor. The protracted deliveries which often go past the next calendar year are also minor in total volume. To a greater extent than the opening deliveries, these late crushings are mainly of table-grape origin. It is generally considered that strippings of vineyards and culls out of re-packing from storage account for most of these supplies.

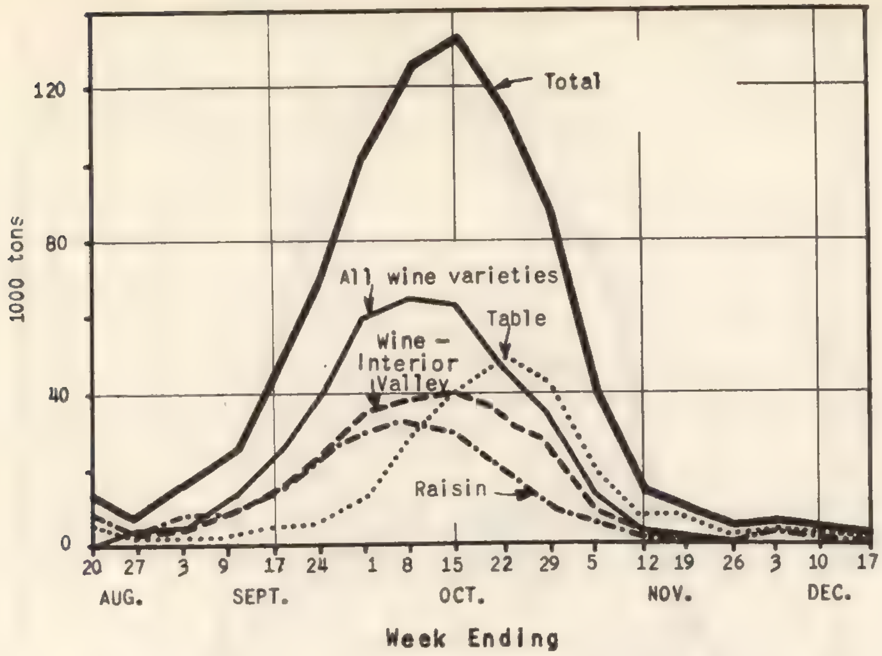
Fig. 39. Grapes Crushed by California Wineries Weekly 1948, by Varietal Classes



In the 1947 season, peak crushing was reached in the week ending October 4th with about 110,000 fresh tons of grapes. The crush remained above 100,000 tons through the week ending October 25th. Tonnage then declined sharply to a level of 10,000 tons in the week ending November 22nd. Crushing in very small amounts, consisting mainly of table-variety grapes was reported through the week ending on December 27th. Early crushing was reported on the week ending August 16th. Fairly heavy crushing was underway by the week ending September 6th at which time the delivery of wine grapes was accelerated. Table grape shipments for winery use were light in the early part of the 1947 season. The peak of the wine grape movement was reached on the week ending on September 27th. By mid-November the wine-grape season was effectively over. Except for early raisin-variety deliveries from fresh deals, the shipment of raisin grapes to wineries coincided closely with the deliveries of wine grapes from the Valley. Table-grape arrivals at wineries were reported in the middle of August but did not reach maximum weekly tonnage until October 25th at which time the crush of wine grapes was declining fast. The protracted shipments in December were mainly table grapes, but their total volume was not large.

The 1948 pattern differed in several respects. There was a single peak of weekly tonnage reached in the week ending October 23rd, with total deliveries of 175,000 tons reported. Early shipments again began in mid-August and were classified mainly as raisin-variety grapes. Deliveries of raisin-type grapes reached a high peak in the week ending October 2nd and declined sharply thereafter. The maximum weekly deliveries of wine grapes from the Valley and from the state as a whole were made on October 23rd. Table-grape deliveries peaked on November

Fig. 40. Grapes Crushed by California Wineries
Weekly 1949, by Varietal Classes



23rd at about 65,000 tons for the week. The total crush in 1948 was heavy and the early delivery of raisin grapes in large volume to the wineries indicated the decision of raisin producers to use the wineries rather than the trays for large parts of the crop in the absence of a raisin program. The late peak in table-grape deliveries was common to all three years. The lengthy delivery into late December was largely table grapes, although raisin-grape deliveries were relatively high in that year. It is apparent that not merely the size of the total crop and of its components but also the utilization of its multiple-purpose components affects the pattern of weekly crushing.

The light 1949 crush was much similar in time pattern to the light 1947 crush except for the five-week duration of heavy crushing in 1947, in contrast to the single maximum-delivery week in 1949. Both wine grapes and raisin grapes reached their peaks on the week ending October 8, 1949. The table-grape peak was reached two weeks later. The early shipments in mid-August were mainly of raisin-grape origin. The fairly heavy shipments to wineries in December were largely table grapes. There appears to be no great difference in the time distribution of wine grapes from the Valley and from the state as a whole.

Neither the shipments at the beginning nor at the ending of the season are significant fractions of the total crush. Early-season shipments include some table grapes but they are mainly residual to early shipments of raisin-type grapes. The post-season shipments are largely table-variety grapes including culls involved in re-packing stored table grapes, late table grapes and vineyard strippings.

SUGAR CONTENT: Considerable information is available with respect to varietal origin and quality-rating of grapes at different parts of the season for the San Joaquin area. Data were obtained directly from the commercial records of vintners indicating the varieties or culls delivered, dates and sugar-readings. Some of these records are shown in summary form in a series of charts in Appendix A to this report. Fairly wide variations in unloads from the various districts have appeared. All records are from 1947, 1948 and 1949 operations in the San Joaquin areas.

Grapes were delivered in 1947 from the Dinuba area as early as August 10th. These were classed as culls. Sugar rating was in the order of 20 per cent. After September 10th, shipments of Thompson Seedless were received with sugar in the order of 25 per cent through September 30th. Muscats ranging about 27 per cent in sugar were also delivered in these weeks. Culls and Sultanas were received through September with sugar readings in the neighborhood of 20 per cent. A few Alicante and Malaga grapes were received with sugar over 20 per cent. Deliveries to wineries resumed in late October and ran through mid-November. These deliveries were mainly culls with low sugar. In this area, either opening or closing dates or both would have eliminated some culls -- if it be assumed that such elimination is desired. Unless a sugar minimum of at least 21 per cent were enforced, culls would have continued through September.

In Livingston, culls only were delivered in small volume and at low sugar until September 2nd. Then Thompsons only were shipped in large volume at about 23½ per cent sugar through September 25th. Shipments ended abruptly except for light deliveries of Grenache and Tokay grapes in October. Opening dates alone could have eliminated culls from the the recorded shipments out of this district in 1947. However, reports on a single year are of course insufficient accurately to generalize to other years.

Kingsburg deliveries did not commence until the second week in September. The bulk of receipts were Thompsons ranging about 24½ per cent in sugar and Muscats which began at about 27 per cent and closed early in November after a ten-day gap at about 25 per cent. Several varieties of wine-grapes were received with sugar well over 20 per cent for all of them. Sugar readings of Sultanas rose sharply through September. Late season Malagas were relatively low in sugar. For this season, sugar readings would have had to be set at more than 20 per cent in order to eliminate grapes from winery outlets. Were the sugar requirement set upwards a small amount to increase the tonnage eliminated, it appears that elimination would have affected entire varietal classes. These data do not indicate that sugar requirements could effectively or equitably have been used in that season for grapes from Kingsburg as a means of controlling either volume or quality of crush.

The Selma shipments were much like those from Livingston. Only a few low-sugar Sultanas were delivered before September 22nd. The bulk of shipments were Muscats averaging from 26 per cent at the beginning down to 24 per cent in the first week of November. A few Malagas reached a sugar content of about 20½ per cent.

Receipts from Parlier were culls running from 22 per cent at the beginning in early August to 18 per cent after mid-October and until the season ended in the second week of November. Other shipments were mainly Muscats at 25 per cent. Late receipts of Malagas were rated at about 20 per cent sugar content. Opening dates could have excluded some culls. Sugar requirements would have had to be set at about 23 per cent in order to eliminate culls. Since all other grapes ran at about the same sugar content, sliding scales of sugar content could not have been used to control volume.

Deliveries to reporting wineries from Exeter were largely culls. Sugar ratings ranged from about 22 per cent on September 1st down to 18 per cent in mid-November when deliveries ended. A sugar minimum of 20 per cent would have eliminated culls received after late September. An opening date could have eliminated early culls.

Receipts from Woodlake were culls only up until September 31st. Sugar ranged from 21 to 23 per cent. Receipts after October 10th were also culls but at less than 19 per cent sugar. September receipts were largely Thompsons at more than 24 per cent sugar. Malagas ranged higher than 20 per cent sugar. Sugar requirements would have had to be at least 23 per cent to eliminate most culls. Sugar ratings could not have effectively or equitably been used to eliminate volume. Opening and closing dates could effectively have controlled culls.

The very large Sanger operation consisted of light deliveries of culls until about September 5th. Thompsons were received in heavy volume thereafter at about 24 per cent sugar. Muscats, in lighter volume, ranked higher. Malagas were about 22 per cent and Alicantes rated about 21 per cent. Late season culls were below 19 per cent. Sliding scales of sugar content as a means of eliminating volume were clearly inapplicable. Opening and closing dates would have eliminated the light receipts of culls. As in most other districts, receipts of culls were concentrated at the beginning and ending of the season.

Reedley deliveries, which were largest in volume of all districts surveyed, support the general conclusion that on the basis of available knowledge neither quality control nor volume control could be attained through minimum sugar standards. Culls at 20 per cent sugar were received from August 12th through September 2nd. Towards the end of the season, culls dropped to about 17 per cent. Sugar rating on Thompsons rose from about 21 to about 24 per cent through the season. Muscats climbed sharply in this district from about 22 per cent to about 28 per cent. Malagas ranged from 21 to 22 per cent. The bulk of receipts was concentrated in a range of about 4 degrees sugar through most of the season. Thus to eliminate a stated percentage of the grapes available for crushing through any practicable change in sugar requirement would not have been possible.

As noted, sugar tests from large commercial concerns were obtained for each load delivered to the cooperating winery over the three seasons 1947-1949. These readings have been classified by day and by variety and within these sub-classifications averages have been computed. The following districts of origin were covered: Reedley, Dinuba, Livingston, Kingsburg, Sanger, Exeter, Snelling, Selma, Parlier, Woodlake, Lodi, Escalon, Modesto, Atwater, Oakdale, Winton, Hilmar, Denair, Irwin, Empire, Hughson, Gallaso, Keyes, Turlock, Clements, Ripon, Ceres, Simms Station, Manteca, Salida, Lathrop, Acampo, Crow's Landing, Ballico, Linden, Linton, Riverbank, Stockton, Tracy, Cressy, Bellota, Waterford, Delhi. Thus far these data have merely been classified and the average readings by variety, by district of origin and by date of delivery have been plotted. Analysis is incomplete, but thus far there are no indications that sugar-reading will serve effectively as a major standard for the enforcement of minimum quality. All evidence indicates that a sliding scale of sugar requirements, to be adjusted upwards or downwards as the supply permitted to be crushed is adjusted, would not work well.

Data from the northern areas of the San Joaquin Valley for 1948 are also shown in the Appendix. Deliveries generally begin later in these regions than in the southern counties of the Valley.

In the Modesto area, early shipments began in 1948 with Thompsons only. These dropped in sugar score from an average of 24 down to about 22 per cent. There were ten different varieties of grapes received over the season by the cooperating unit. Carignanes were received continuously from September 27th, with sugar climbing from first readings of about 21 per cent to 22½ at the end of the season. A few loads of Malágas, Palominos and Ribiers were below 20 per cent in sugar. Shipments to the winery were sharply curtailed after November 1st.

In Escalon in 1948, early shipments were almost all Thompsons, increasing in sugar from a first reading of 20½ to about 23 per cent when the season ended for these grapes on October 25th. Carignanes ranged from 20 per cent sugar up to 23 per cent towards the end of the season. A few varieties ranged below 20 per cent. Shipments to wineries had terminated by November 10th.

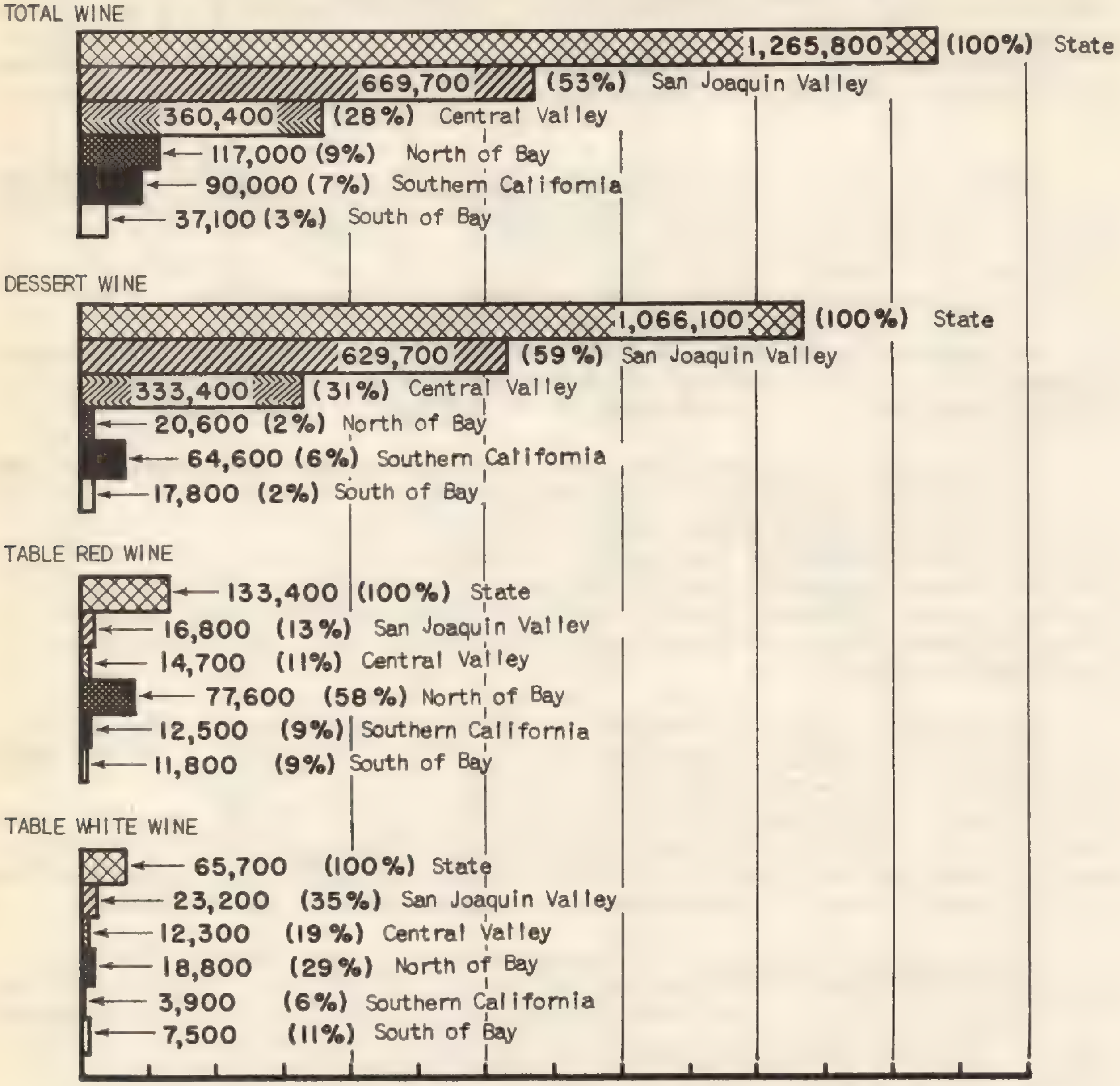
In Manteca and Salida in 1948, the crushing season ran from mid-September to late October with relatively few varieties crushed. A sugar minimum of 20 degrees would not have eliminated significant tonnage.

In Lodi, the cooperating winery received nineteen different varieties over a crushing season running from September 26th through November 15th. There was no clear sequence of varieties, such as prevailed in the southern areas of the Valley. Sugar reading for the bulk of deliveries ranged from 18 to 21 per cent. Very few loads registered below 16 per cent. In this area, there were not the typical opening shipments of culls in light volume nor were there the typical light shipments of strippings and culls from storage after the close of the wine-grape season.

This much is clear with respect to sugar as a measure of quality and as a device for its control: there are wide variations by districts and varieties. There may possibly be wide variations over the years as a function of size of crop or date of maturity. Evidence now available indicates that sugar-content should not be used as a means to control either quality or volume. The data are collected and preliminary analysis has been completed, but considerably more work is needed before reliable answers to these questions can be gotten.

GEOGRAPHIC DISTRIBUTION: Production of wine is concentrated in three regions of the state -- the Interior Valley, the Central Coast and a small area in Southern California. More than half the grapes used for wine in the years 1945-48 were crushed in the six counties of the San Joaquin District, with by far the heaviest volume concentrated in Fresno County. Nearly 30 per cent of grapes used for commercial still-wine production are crushed in the Central Valley. Thus the Interior Valley -- mainly from Sacramento County south to Kern County with San Joaquin and Fresno Counties the heaviest -- accounts for more than four-fifths of the grapes which are used commercially in the production of wine. The Central Coast uses a little less than one-eighth of the tonnage, with 9 per cent in the North Bay and 3 per cent of the State total in the South Bay. Southern California uses some 7 per cent of the grapes crushed. The Interior Valley dominates in dessert wine, using 90 per cent of the grapes crushed for that purpose. The Central Coast uses only 4 per cent and Southern California about 6 per cent of grapes crushed for dessert wines. In table red wines the Central Coast uses two-thirds of the grapes, with the North Bay area alone accounting for 58 per cent. The Valley uses about 54 per cent of the grapes crushed for white table wine. The Central Coast production absorbs about 40 per cent of the grapes used for white table wine. In summary, utilization of grapes for wine is clearly concentrated in a few regions. The Interior Valley dominates in all segments except table red wines, in which the Central Coast and especially the North Bay area are the major users of grapes.

Fig. 41. Equivalent Tonnage of Grapes Used in Producing California Commercial Gross Production of Still Wine, by Districts July 1 - December 31, Annual Average 1945 — 1948



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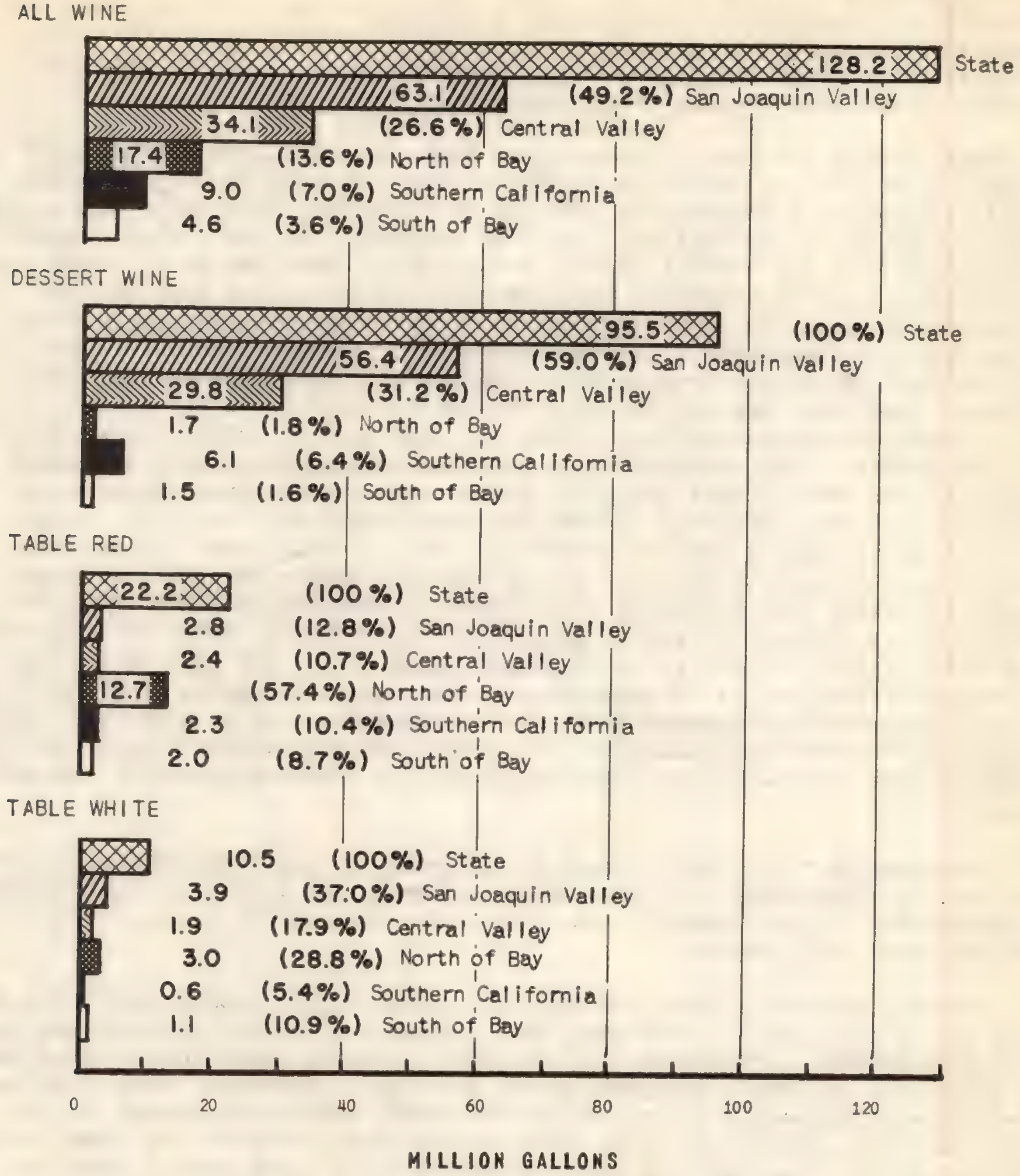
concentrated in a few regions. The Interior Valley dominates in all segments except table red wines, in which the Central Coast and especially the North Bay area are the major users of grapes.

Fig. 42. Average Annual Gross Wine Production by Districts, 1945-1949



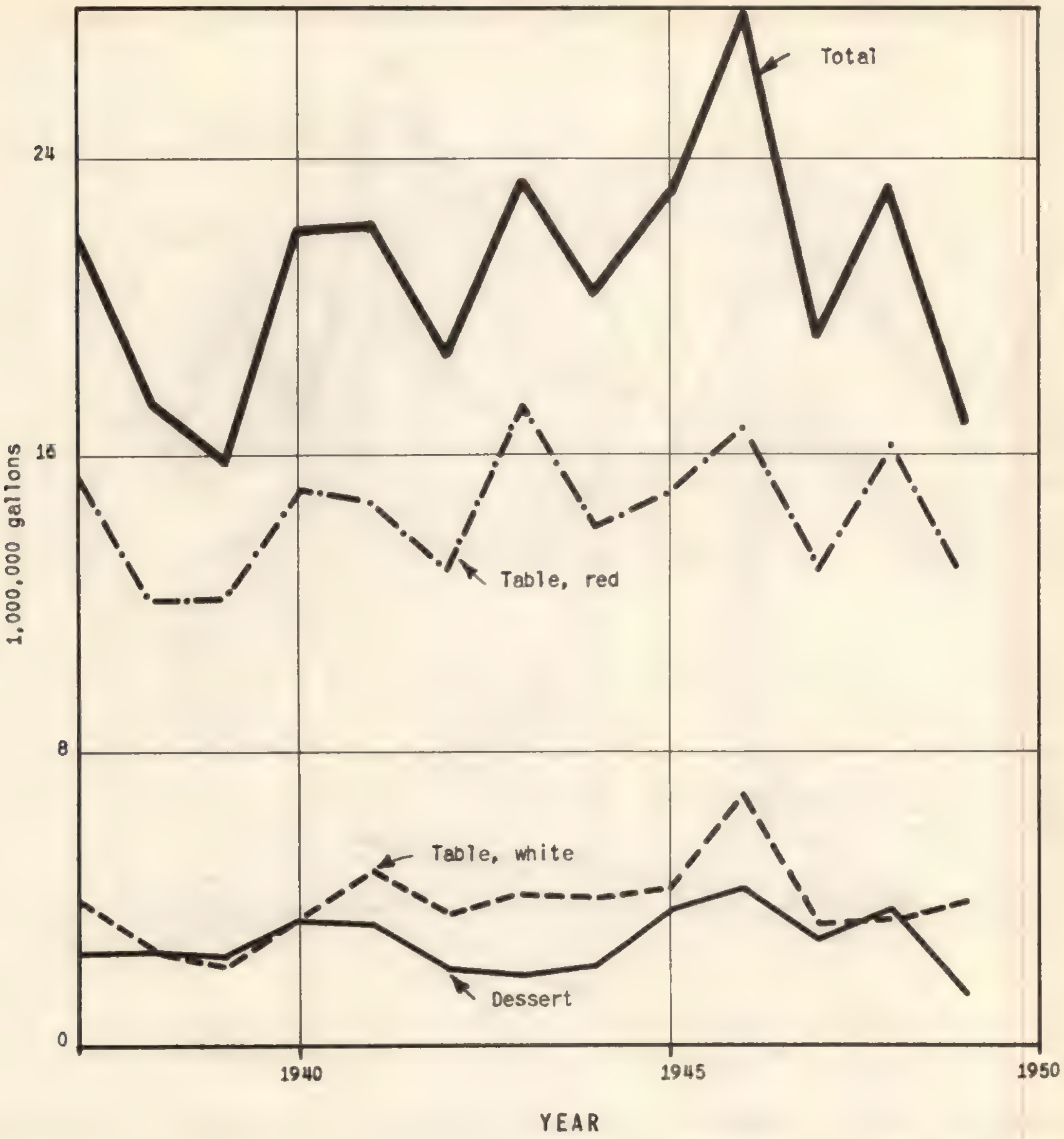
The pattern of wine production is slightly less concentrated geographically than is the pattern of grape utilization. The Interior Valley turns out a little more than three-fourths of all the commercial still wine production in the state. On the average in the years 1945-1949, the San Joaquin District produced about 50 per cent of the state total with an annual average production of 63 million gallons while the Central Valley District produced more than one-fourth of the state total, with 34 million gallons gross production. More than 80 per cent of dessert wine production is localized in the Valley with roughly the same percentage distribution between the Central and San Joaquin areas as in utilization of grapes for crushing for dessert wine production. There is no clear-cut concentration in gross production of table white wine. The North Bay heavily dominates in the production of table red wine.

Comparison of the year of heavy crush 1946 with the light year of 1949 indicates that different areas in the state were quite differently affected. These differences are probably as much due to different patterns of utilization as to differences in the regional impact of weather. The San Joaquin Valley produced more than the average annual production in 1945-1948 in all wine, in dessert wine, in table white and table red wines in the heavy year of 1946. The Central Valley produced more wine in all four categories in 1946 than in the average year, commanded a larger percentage of total production in the state but lost ground percentagewise in dessert production despite increased gallonage. The North Bay region also increased production in all classes when measured by gallons but fell behind in percentage of total production of all three classes. The South Bay region of the Central Coast also increased in gallons produced but fell behind in percentage of state production in all categories. In the light year of 1949 the San Joaquin fell slightly in its percentage of all wine produced, increasing its percentage command in table wines but decreasing very slightly the percentage of dessert wine produced. The Central Valley fell behind in table wine but more than made up the difference in dessert wine. So far as these two very different years are concerned, there is no indication that years of bumper crops affect the various regions very much differently. It is probable that regional differences in weather may lead to significant differences in regional production. It is also more probable that differences in utilization of table or raisin variety grapes over the years will have greater effect than weather on the relative status of the various regions.

There have been no great changes in the relative positions of any district since repeal. This conclusion is clearly apparent when production by districts is considered as a percentage of the state total for dessert wines, table red wines and table white wines.

The trend in total production of still wines in the Central Coast area was upward to the peak year of 1946 when gross production in that district was about 28,000,000 gallons. Production has been off to pre-war levels of a little more than 20,000,000 gallons gross production since then. There has been almost no long-run change in annual output of dessert wines, which have ranged in the neighborhood of 3,000,000 gallons. Table white wine production has been in the order of 4,000,000 gallons with a slight upward drift since 1937. Table red wine has also drifted upward at about 14,000,000 gallons. Percentagewise, there has been a very slow and very minor decrease in the amount of dessert wine produced here when compared to the state total. The same very slow and very minor downward trend appears in the table red and the table white series when Central Coast production is expressed as a fraction of state output in those classes. These changes in the relative status of this district are shown in Appendix Figure 35. The gross production series for the North Bay area has shown a long-run upward trend from which no significant departure has yet appeared. This trend is due mainly to increases in table red production. As a percentage of state output, the North Bay has lost no ground in either table red or table white gross production. The decline in dessert wine production has been minor in both gallons and percentage. The South Bay, except for the past three years, has held almost exactly steady in gallons produced. However,

Fig. 43. Central Coast Gross Still Wine Production by Classes During July-December, 1937-1949



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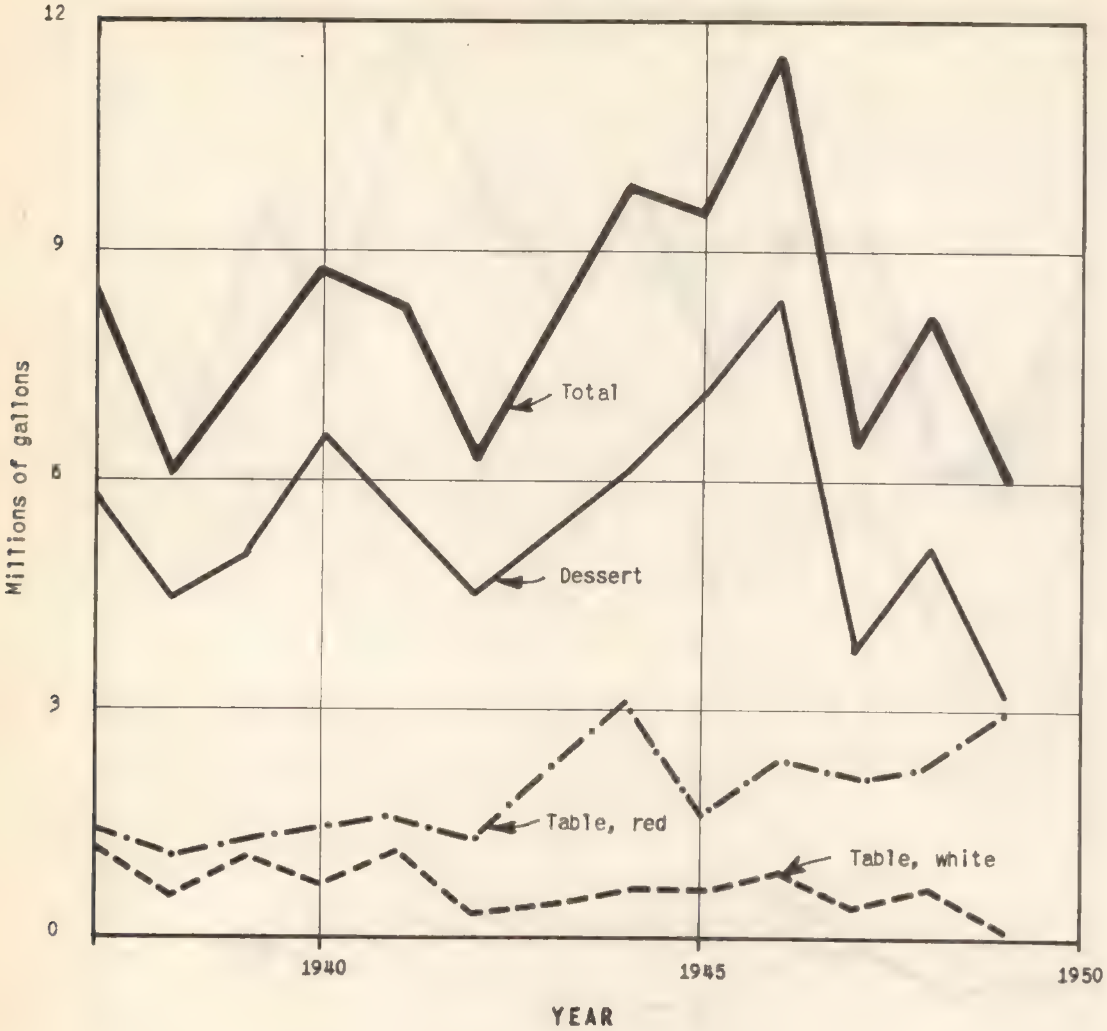
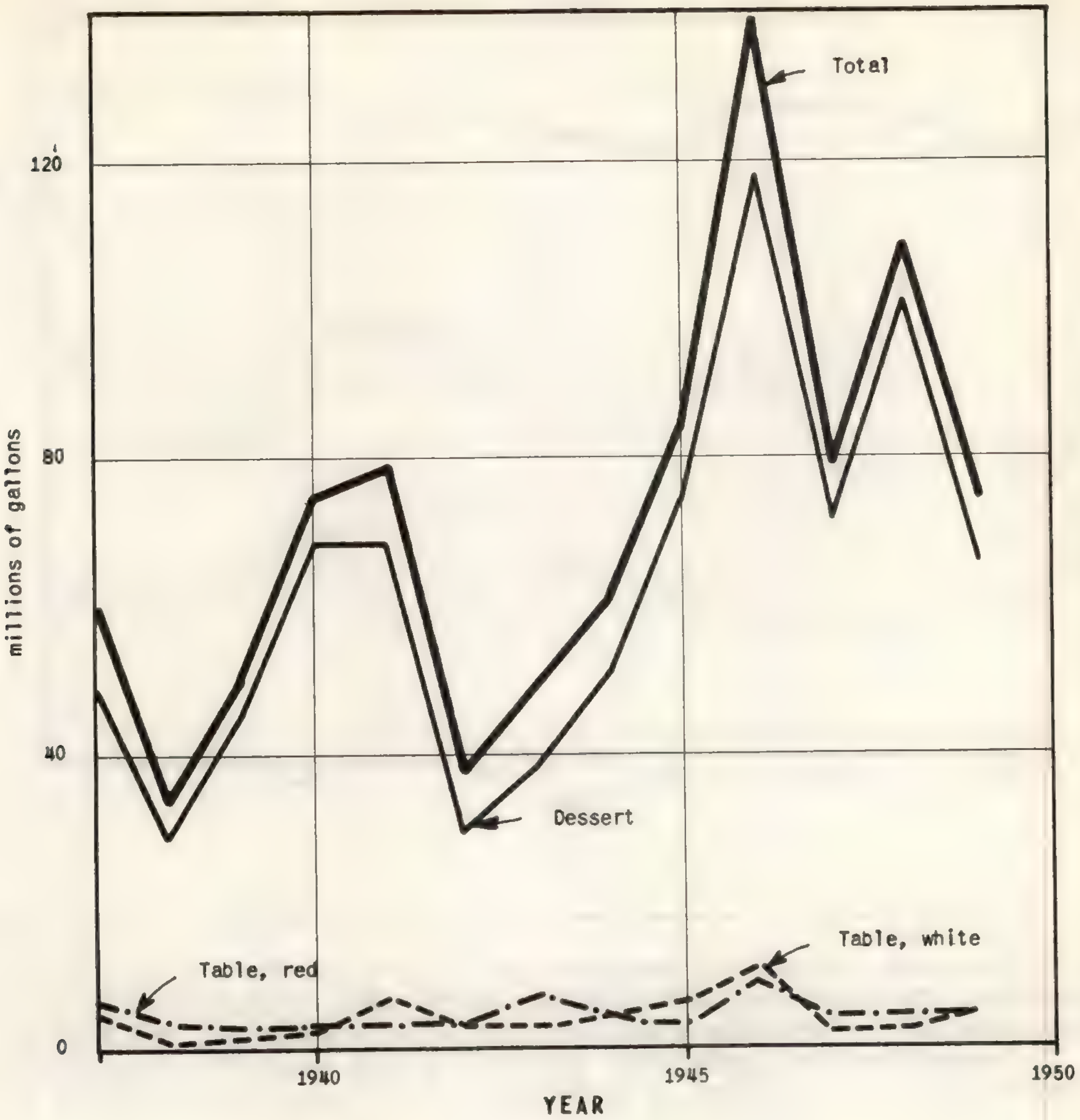
in this expanding element of the grape industries, steady output in gallons has meant a decline relative to other areas. Total gross production at a little more than 4,000,000 gallons shows wide annual fluctuations but no marked trend. Table red wine output has declined, but the decrease has been offset except in the last three years by increased output of both table white and dessert wines. The percentage of the state total of table white produced in the South Bay has dropped from about 15 to about 10 per cent over the past 12 years. Table red has dropped from about 13 per cent to about 8 per cent of the state total of gross production in these classes. Appendix Figures 36 through 39 show these changes in production in the North and South regions of the Central Coast District. They may be summarized briefly by noting that the greater part of the decline in the relative status of this district is due to faster growth in other parts of the state. The North Bay area shows no important decline in its status. The South Bay has declined fairly sharply in the percentage of wine produced.

Fig. 44. Southern California Gross Still Wine Production by Classes During July-December 1937-1949



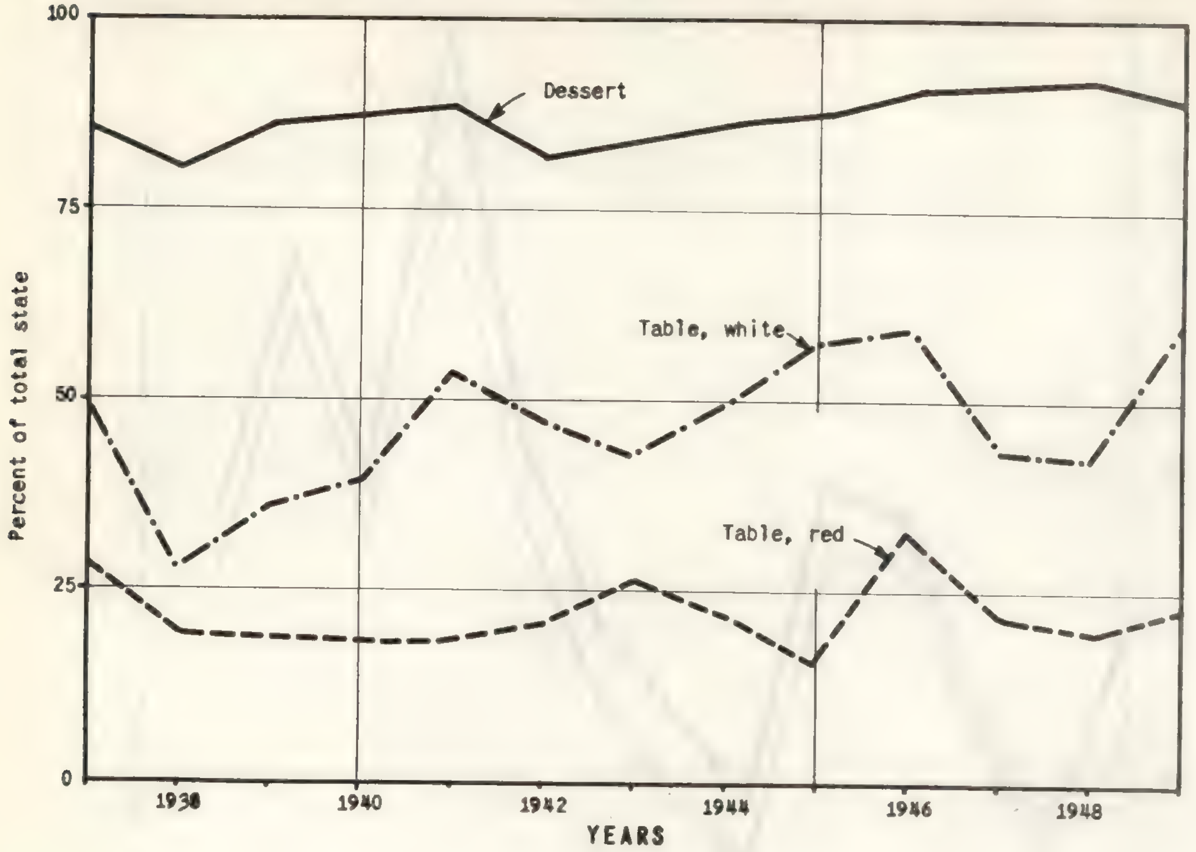
Production in Southern California shows three main attributes: no clear trend in gallons produced; a slight upward trend in table red wine but fairly pronounced downward drifts in both dessert wine and table white wine when expressed as percentages of the state total in those classes; wide and erratic year-to-year variations in the gross production of dessert wine. Total gross production was 11½ million gallons in 1946 but was only some 6½ million gallons in 1947. These variations are largely due to changes in dessert wine output. Gross production of table red wine has climbed slowly from about 1½ million gallons in 1937 to nearly 3 million in 1949. Table white wine at less than a half million gallons has been decreasing slowly. The percentage decline has been sharpest in dessert wine falling from 10 to 5 per cent of the state total since 1937. The table red wine series has climbed from about 6 per cent to almost 15 per cent of the state total. Table white wine has decreased sharply. Figure 44 shows the wide changes in gallons produced, especially in dessert wine. Even sharper fluctuations appear when production is expressed as a percentage of the state total. Both dessert and table red wine output has changed by as much as 5 per cent of the state total in one year. The table white series changed even more sharply.

Fig. 45. Interior Valley Gross Still Wine Production by Classes During July - December 1937 - 1948



The Interior Valley is the source of by far the largest part of total gross wine production. Aside from the war years when government authority affected the utilization of the grape crop, there has been a clear drive upward since the time of repeal. Nearly 140 million gallons were produced in 1946. Production in the last year was the lowest since 1944, but there is no sign that a permanent downtrend has set in. Figure 45 shows the very sharp fluctuations in yearly gross production to which this region -- and therefore the entire grape industry -- is subject. Table red wine and table white wine show no discernible trend in gallons. They are a minor part of the total output of the Interior Valley. Both series have exceeded 7½ million gallons per year in gross production, and table white wine exceeded 10 million gallons in 1946. Both classes have leveled off in the neighborhood of 5 million gallons or less since then. Gross production has increased from one year to the next in this district alone by more than 50 million gallons. It has also decreased by as much as 60,000,000 gallons from

Fig. 46. Interior Valley Gross Still Wine Production as Percent of Total State, By Classes, July 1 - December 31, 1937 - 1949



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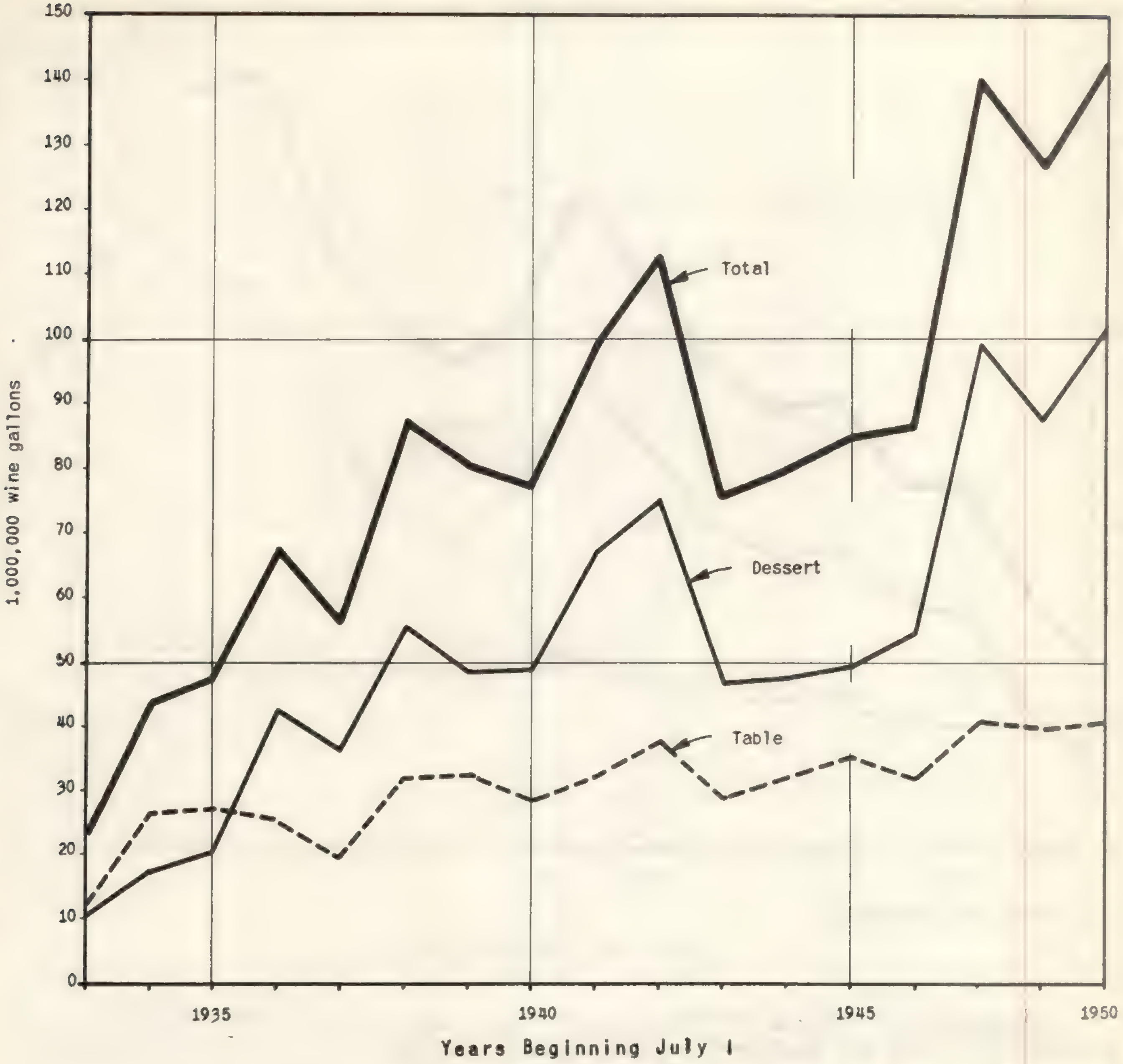
one year to the next. By far the greatest part of the variability in the total gross production for the Interior Valley is attributable to variation in the gross production of dessert wine since this is so large a part of the regional output. The growth in total California production also parallels this series again because the Interior Valley is so large a part of the state in terms of output.

However, the rate of growth in the Interior Valley has not been much greater than the rate of increase in the state as a whole, which means that other areas have not fallen behind significantly. Figure 46 shows the production of the three classes of still wine in the Interior Valley as percentages of total production in the state for each year from 1937 through 1949. The striking series is dessert wine production. There has been a very slow rise in the percentage of state production turned out in the Valley, increasing from about 85 per cent to about 90 per cent over a dozen years. There is very little year-to-year fluctuation in this series, which indicates that the Valley is affected about the same as other areas by weather or other output determinants. There has been no trend in the percentage of table red produced in the Valley, running fairly steadily between 20 and 25 per cent of the state total. In the relatively small total production of table white wine, the Valley has increased relative to other areas, with gross production ranging from 40 to 55 per cent of the state total in this class.

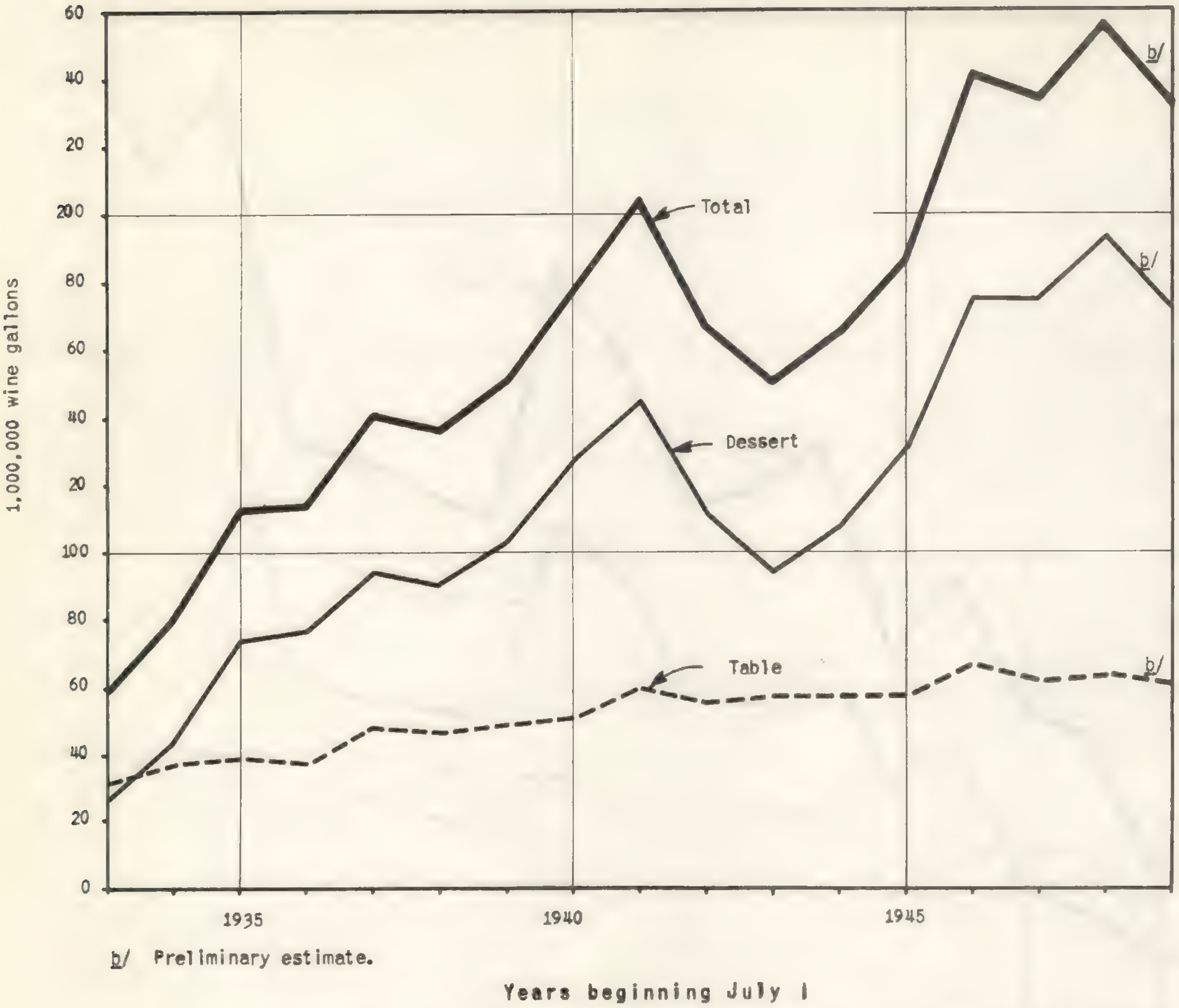
Except for the South Bay, most districts have pretty well held their own.

Fig. 47. July 1 Stocks of California Commercial Still Wine
1933 - 1949



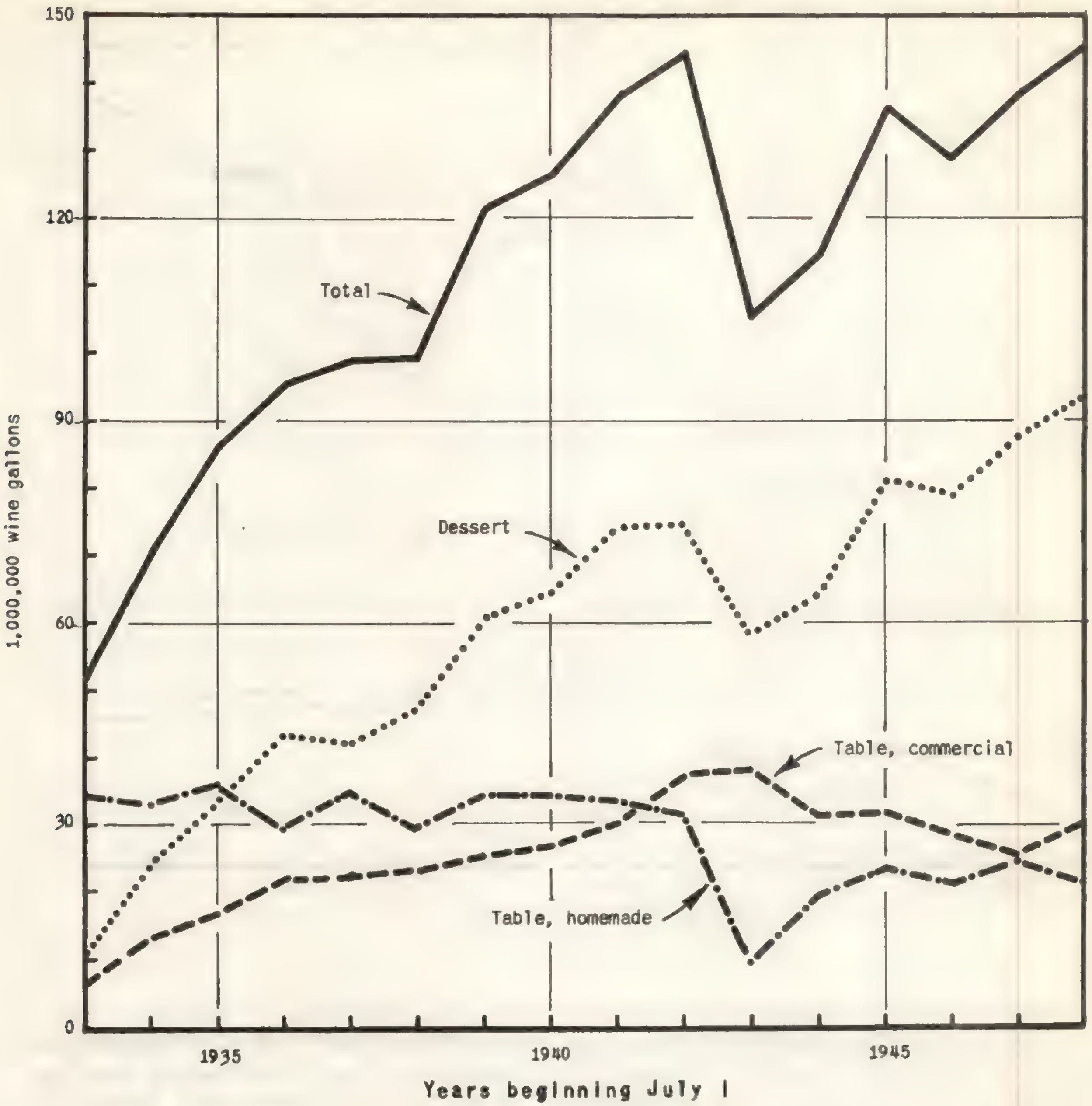
WINE STOCKS: Since repeal, the stocks of commercial still wine from California on hand as of July 1st each year have increased sharply. During the four war years, stocks fell with production. Immediately after the ending of the war, the pre-war trend appears to have been resumed. Total stocks now range in the order of 140 million gallons which represents an increase of about 100 million gallons since the repeal of the Eighteenth Amendment. July 1st stocks of dessert wines now run in the neighborhood of 100 million gallons, from a 1933 level of about 10 million gallons. Stocks of table wines have also increased in a linear trend up to about 40 million gallons but the rate of increase is very much less than for dessert wines. Variability around the trend is greater in terms of gallons for the dessert wine series than for stocks of table wines. It is not possible to predict how long this uniform upward trend in stocks may be expected to continue.

Fig. 48. Total Supply — July 1st Stocks Plus Net Finished Production — of California Commercial Still Wine, 1933-1949



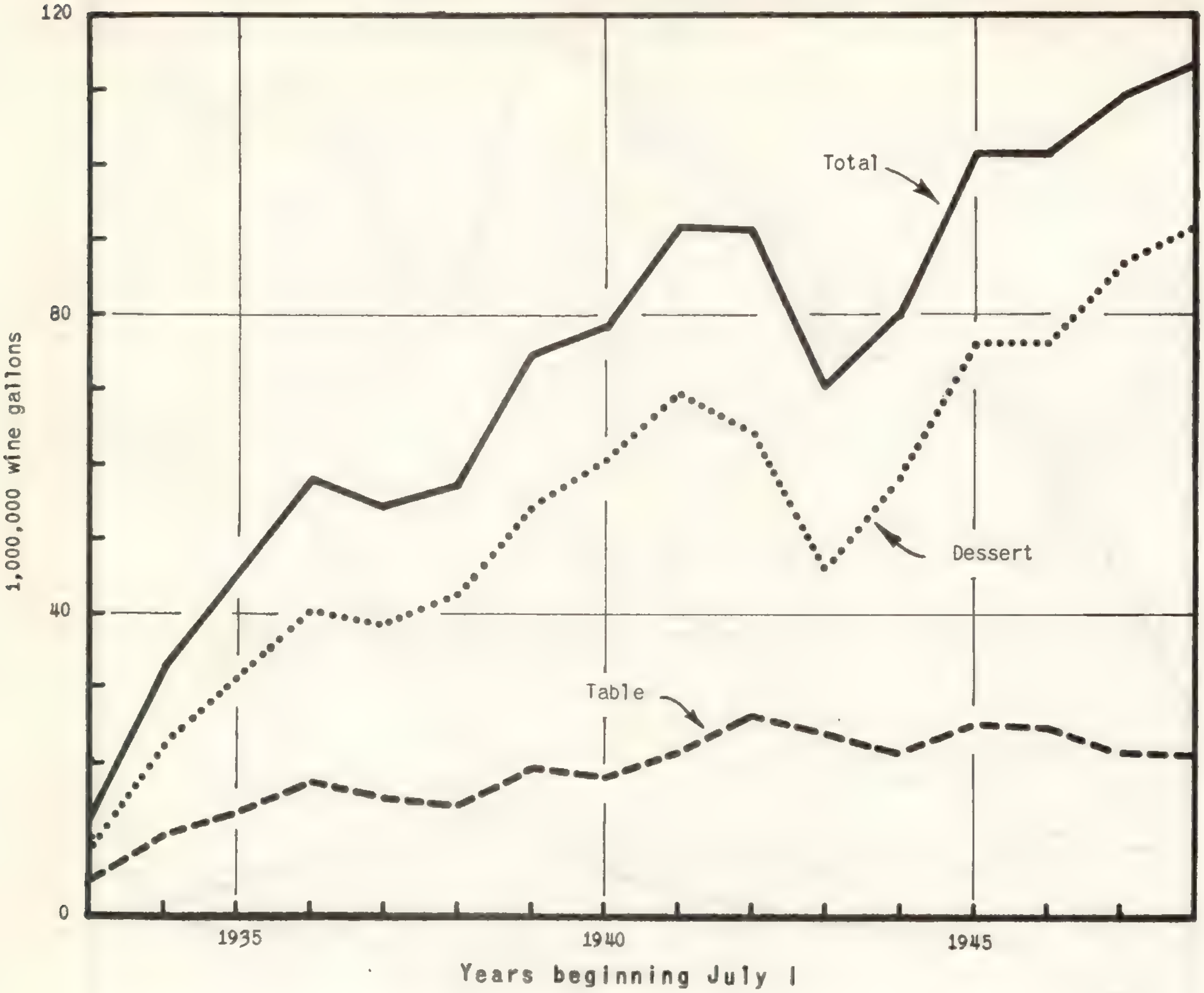
TOTAL SUPPLY: Stocks of wine on hand as of July 1st plus net finished production during the next twelve months may be defined as the total merchantable supply over that period. This series looks much like the other indices of the growth of the wine industry. There has been a steady upward trend in total supply, interrupted by the war, but resuming again the pre-war rate of increase. Total supplies have increased since repeal from about 60 million gallons to current levels of about 250 million gallons. There has been less variability from year to year in the series for supply than in either stocks or gross production, since both storage and processing of gross production are used to lessen the impact of erratic variations in production or utilization of grapes which lead to erratic variations in gross production of wine. Dessert wine supply has also grown in an uniform manner, and has reached 190 million gallons. The total supply of table wine has just about doubled -- while the far larger supply of dessert wine has just about tripled -- since 1933. The table wine supply has also increased very uniformly. To the extent that these series are free of the fluctuations in the raw materials series, the wine industry by careful management has freed its selling-market of alternate overloading and famine.

Fig. 49. Home-made Wine Production and Tax-Paid Withdrawals of Commercial Still Wine for Consumption in the United States, 1933 - 1948



APPARENT CONSUMPTION: Production of home-made wine shows a steady downtrend. There was a sharp dip during the war years when transportation facilities were regulated. It is estimated that consumption is now running in the neighborhood of 20 million gallons from a 1933 estimate of about 35 million gallons. Withdrawals of table wine from commercial sources peaked in 1943 but have declined since then. Dessert wine withdrawals have risen uniformly, almost in a straight line, since 1933. From initial withdrawals of about 10 million gallons in 1933, usage has increased to more than 90 million gallons in the year 1948-1949. Thus in terms of rate of expansion as well as in terms of amount marketed, the dessert wine segment may be distinguished from the table wine segment. The three components of the industry -- home-made wine, commercial table and commercial dessert wines -- have risen to an annual total about 140 million gallons apparent consumption.

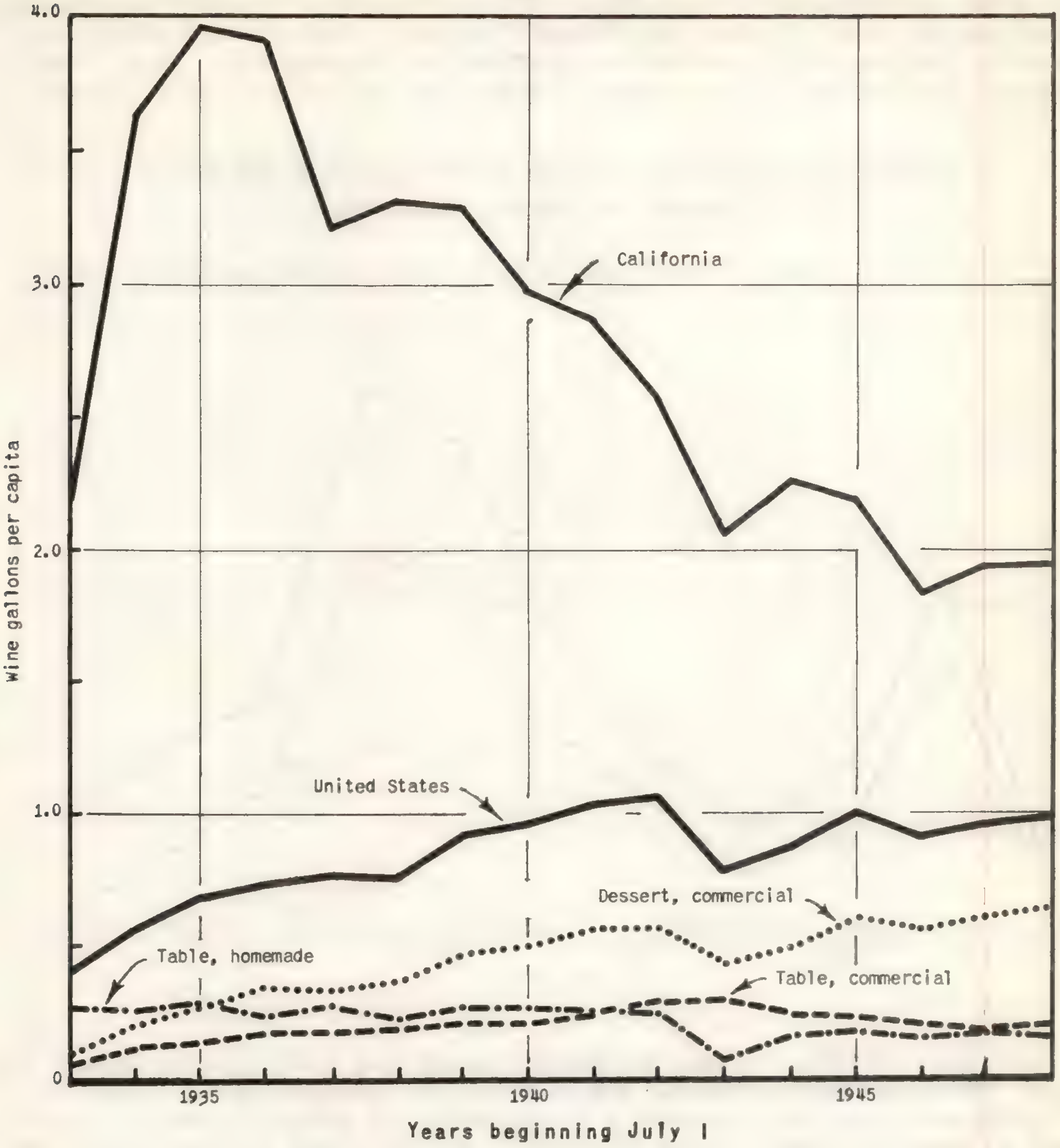
Fig. 50. Disappearance — Total Supply Minus Year-End Stocks — Of California Commercial Still Wine, 1933 – 1948



Disappearance of commercial wines is an approximation to actual consumption. This series has also climbed steadily, with relatively less fluctuation than in gross annual production of wine or grapes. In the 1948-49 years more than 110 million gallons were moved. The table wine series climbed slowly to a peak of a little more than 25 million gallons and has since declined slowly. Disappearance of dessert wine has reached more than 90 million gallons per year. The only major downturn in disappearance of dessert wines occurred during the war.

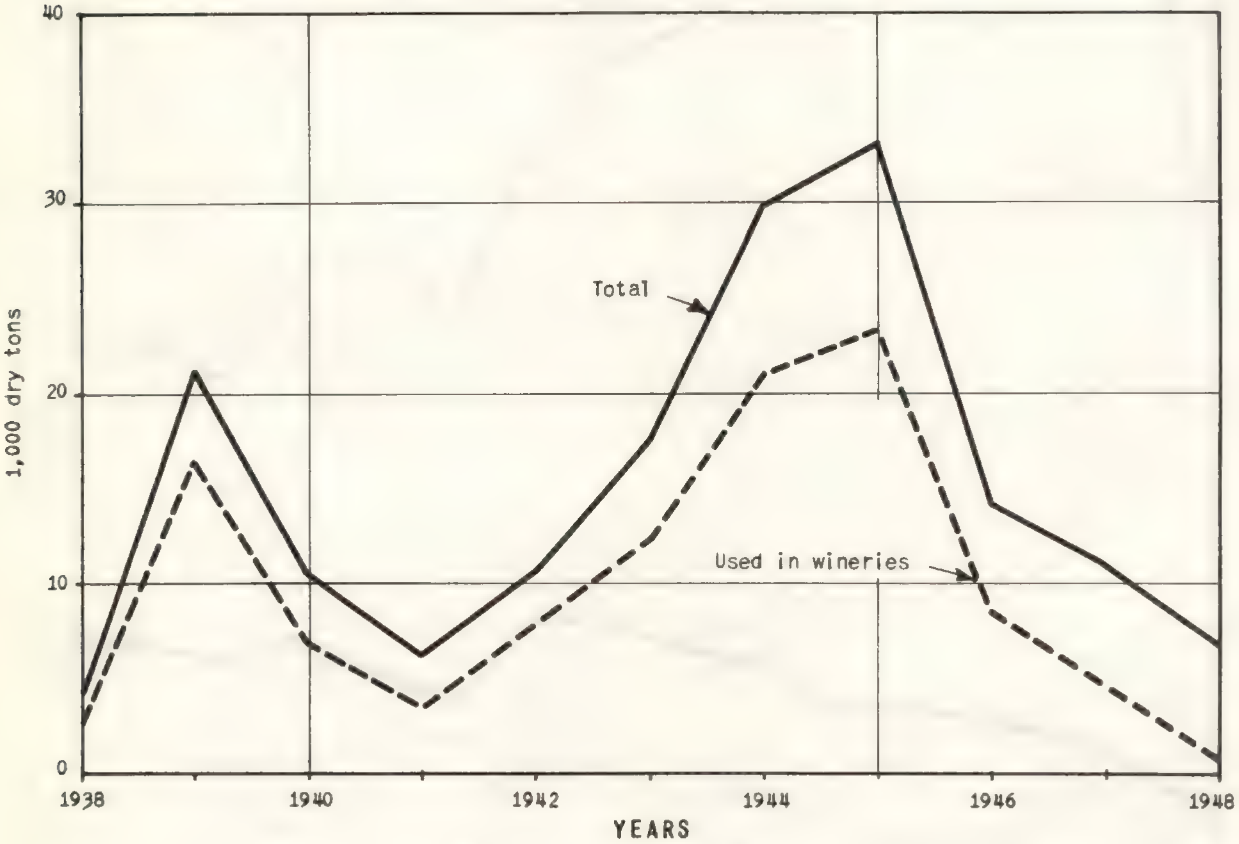
Inventories and apparent consumption in both dessert and table wine classes appear to be quite closely related over the years. Monthly consumption may be only roughly approximated by reference to monthly tax-paid withdrawals. Monthly withdrawals of dessert wines show a steady upward trend but there are very wide fluctuations, which are probably not reflected in actual consumption. Such withdrawals of dessert wine have recently exceeded 10 million gallons per month. Table wine withdrawals are running somewhat less than two million gallons per month since 1946. Withdrawals of imported wines have been less than one half million gallons monthly since 1946. The trend upwards in consumption of dessert wine has been continuous.

Fig. 51. Per Capita Home-made Wine Production and Tax-Paid Withdrawals of Commercial Still Wine for Consumption in the United States and California 1933 - 1948



Per-capita consumption of wines in the United States has more than doubled since 1933. Average apparent consumption is now about one wine gallon per person per year. Consumption of commercial dessert wines accounts for about five-eighths of this amount. Except for the dip during the war shortage, consumption of commercial dessert wine has been steadily rising. Per capita consumption of home-made table wines appears to have dropped from about one-quarter gallon per year to about one-eighth gallon per person per year. Per capita annual consumption of commercial table wines peaked at a little more than a quarter gallon during the war but has since declined slightly. Per-capita consumption in California has fallen from a 1935 level of four gallons per year to less than two gallons in 1948. Part of this per capita decline in the large California market is probably due to entry of new populations into California from other parts of the nation. How much of it is due to price policies, competition from other goods or other causes is not known. The per capita consumption of grapes has been expanded faster through the dessert wine segment of the grape industries than through any other branch.

Fig. 52. California Raisins Used in Making Brandy and Spirits In the United States, 1938-1948



BRANDY AND SPIRITS: Almost all of the brandy made in California is made from grapes. The exact amounts so used are difficult to determine since reports are made in terms of gallons of materials for distillation and such materials vary widely in alcoholic level. It is therefore a difficult task to convert such data back to equivalent tons of fresh grapes. Raisins have never been a major source of raw materials for distillation. Minute amounts are used directly in wine. The pre-war peak in raisins was 21,000 tons used for brandy or spirits which is the equivalent of about 85,000 tons of grapes. In 1945, about 33,000 tons of raisins -- or 130,000 equivalent tons of fresh grapes -- were so used. This wartime utilization has shrunk greatly. Only about 7,000 tons of raisins were used for brandy or spirits in 1948. Less than 1,000 tons were used in wineries. It does not appear that raisins have constituted an important source of supply. Data are not available to indicate the degree -- if any -- to which rain-damaged or other damaged raisins, packing-house sweepings or other raisin residues are diverted to wineries or distilleries.

Fig. 53. California Fruit Brandy Total, Beverage and Neutral: Gross Production, Stocks, Supply and Disappearance, Years Beginning July 1, 1933 - 1949

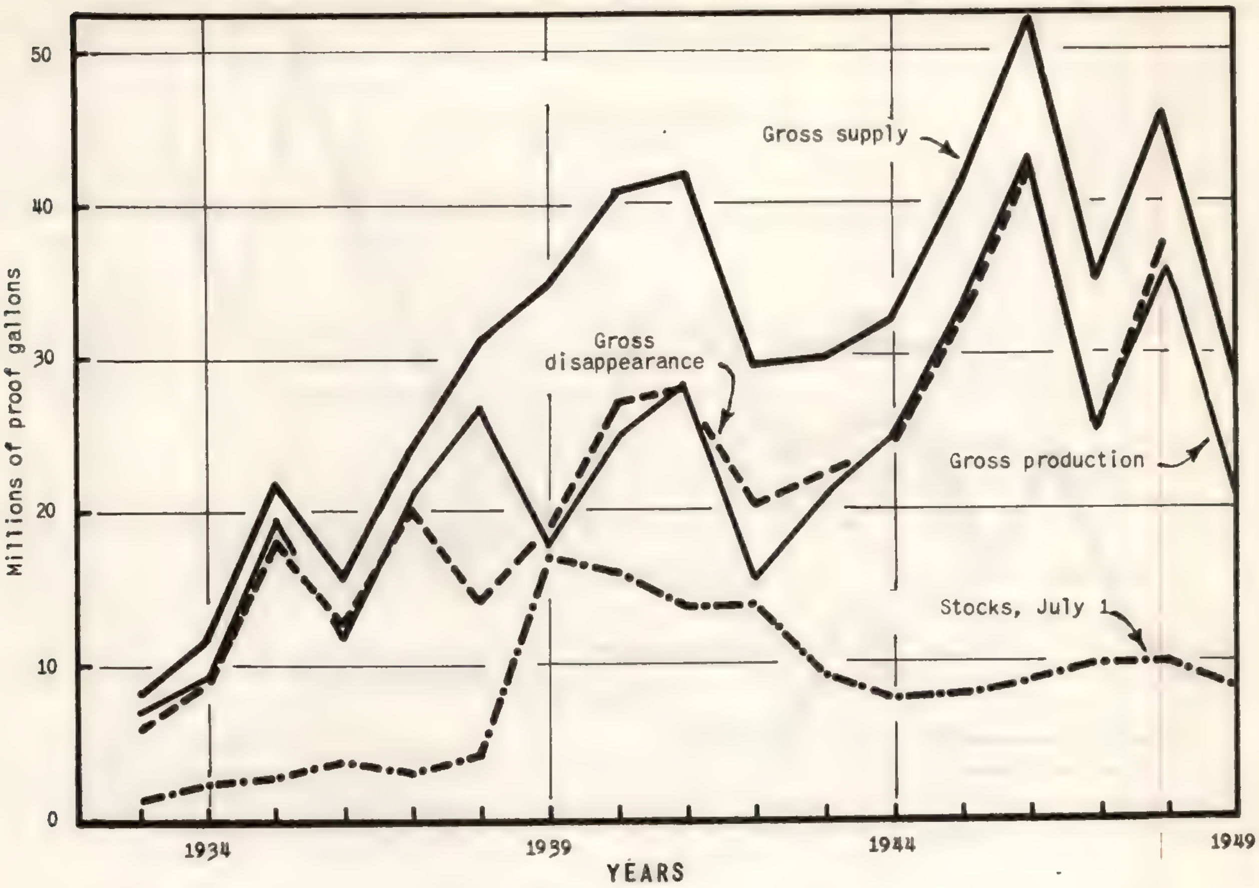
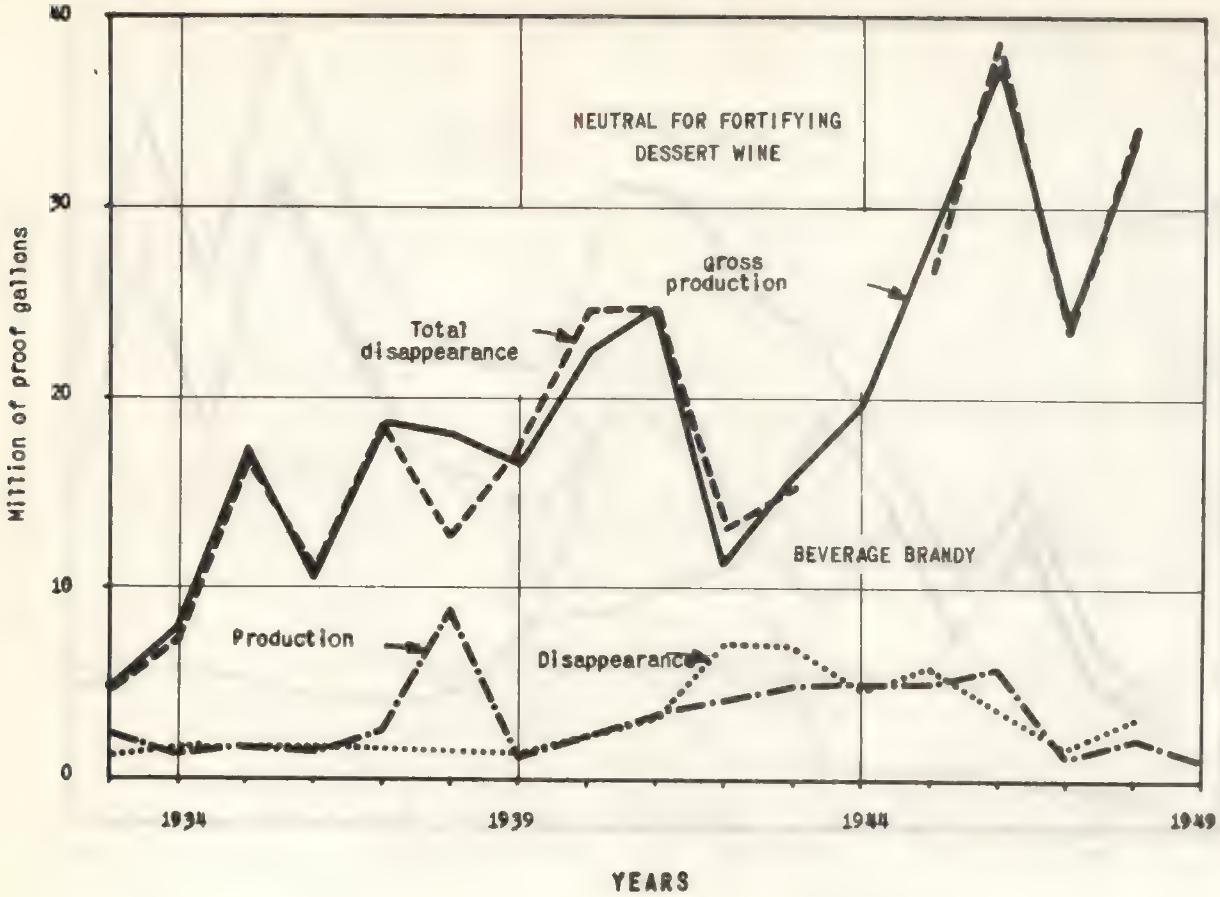


Figure 53 summarizes the production and marketing of brandy for beverage and fortification purposes combined since 1933. Stocks increased sharply in 1939 through industry programs. There has been a slight down-trend in the amounts on hand since then. Gross production has climbed sharply from less than ten million gallons per year to more than 40 million gallons in the peak year of 1946. Gross disappearance has been almost equal to gross production. The total gross supply has therefore closely followed the gross production series. There have been three relatively low years since the 1946 peak.

The fruit brandy market is largely a grape brandy market. The grape brandy market is largely tied to fortification of dessert wines. Brandy for beverage purposes has fallen to about two million proof gallons per year in both production and disappearance. Production and disappearance of neutral spirits for fortifying dessert wines have grown sharply and steadily. In recent years production has been about 30 million gallons. The making of grape brandy and spirits may therefore be expected to follow about the same development as the production of dessert wines. There is considerable year-to-year fluctuation in gross output of brandy. Gross disappearance is very closely correlated with the production series. Most of the variation in both output and use is in the neutral spirits for fortification. Beverage brandy shows fairly wide annual variations around the downward trend.

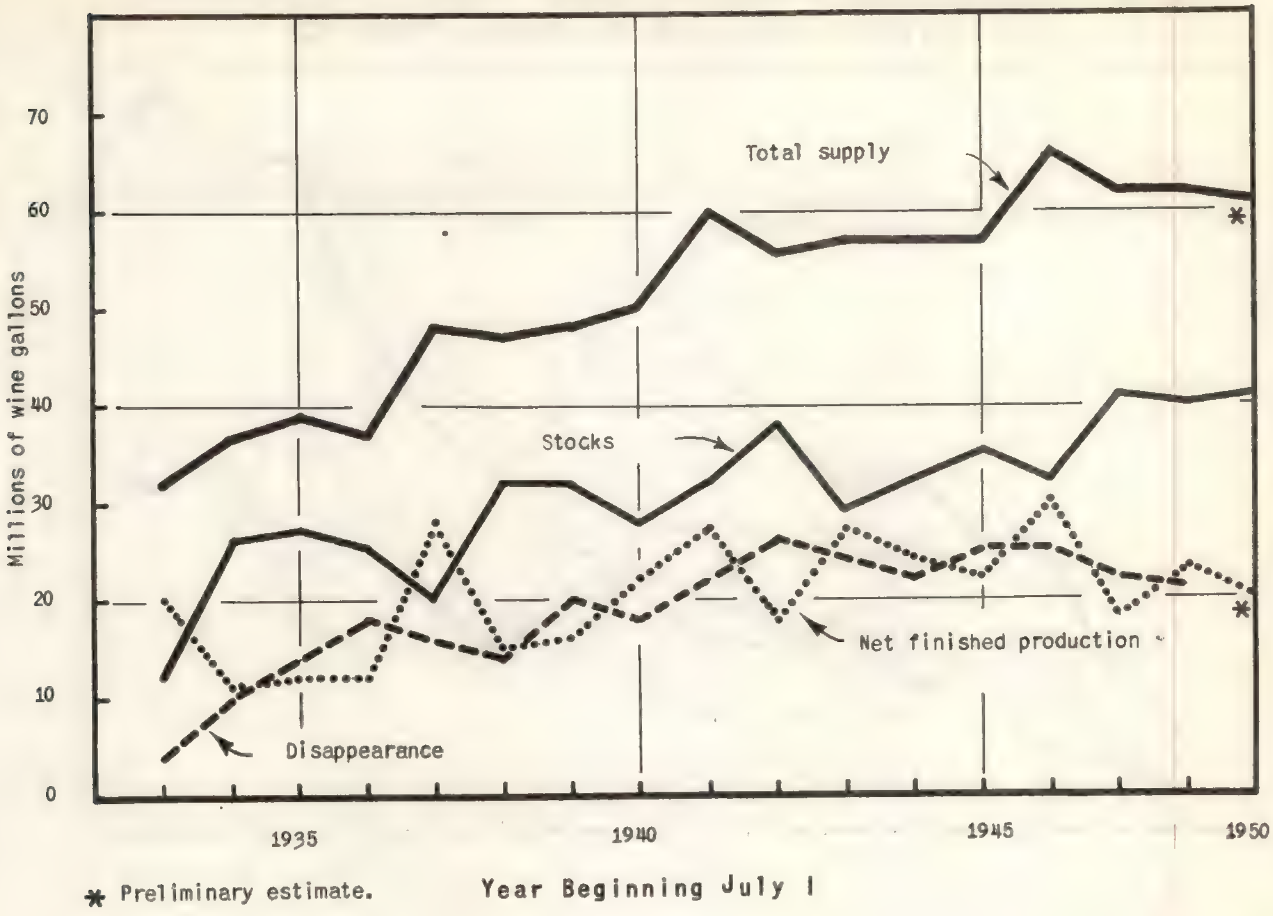
Fig. 54. California Fruit Brandy Beverage and Fortification: Gross Production and Disappearance, Years Beginning July 1, 1933-1949



SUMMARY, WINE PRODUCTION: Figures 55, 56 and 57 summarize the development and the current status of the California wine industry since 1933.

Production and marketing of table wines, disregarding the past few years, have grown steadily since commercial activity again expanded with repeal of the Prohibition amendment and laws. Net finished production over the full period has shown only a very slight expansion, if any. Production was in the order of 20 million gallons in 1933 and had exceeded that level by 1937. In the last ten years, net finished production has dropped below 20 million gallons on three occasions. Disappearance of table wines was at a lower level than net finished production in the years immediately following repeal. There was thus a slow but steady increase in disappearance of table wines through 1942, with more than 25 million gallons moving in that year. Since then there has been a gradual downturn with disappearance per year running close to 20 million gallons. Both the series representing stocks on July 1st of each year and total supply -- stocks plus net finished production -- have climbed rapidly. Since repeal, stocks on hand had risen from about 10 million gallons to about 40 million gallons in each of the last three years. Total annual supply has risen at about the same rate. Supply was about 30 million gallons per year in 1933. In the past three years, it has risen to more than sixty million gallons. The annual fluctuations around this rising trend have not been excessively severe.

Fig. 55. Table Wine: Production, Stocks, Supply and Disappearance of California Commercial Still Wine, 1933-1949

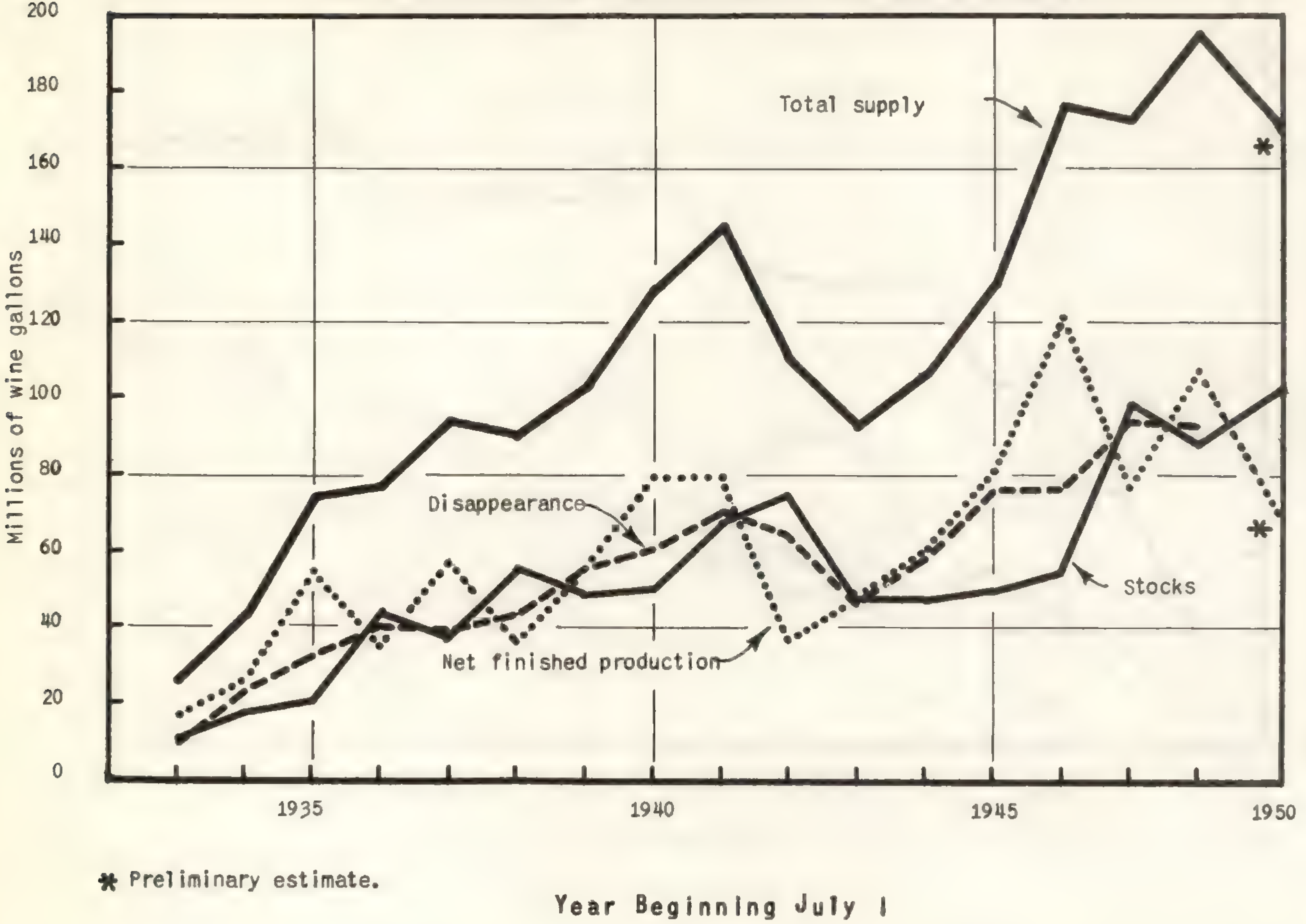


The spread between stocks and total supply has widened as compared to the early years of the industry. In the face of slightly decreasing consumption since 1942, stocks have continued to rise. The gap between consumption and stocks, and consumption and supply as well, remained fairly constant up to the first years of the war. Since then both gaps have widened somewhat.

Figure 56 shows the same basic data for dessert wine production and consumption. Several differences as compared with the table wine series are immediately apparent. The rate of increase has been greater. There are yet no signs of a downturn in any of the trends. The effect of the war years upon production was greater than in table wines.

Net finished production had reached about 80 million gallons before the war broke out. In 1946, the dessert wine industry turned out a net finished production of about 120 million gallons. Except during the war years, when stocks fell well below disappearance, the industry has carried stocks of almost the same amount as is consumed in a year. Stocks of table wines considerably exceed one-year's consumption. The trends in net finished production and disappearance have been about the same. Annual total supply of dessert wines exceeded 190 million

Fig. 56. Dessert Wine: Production, Stocks, Supply, and Disappearance of California Commercial Still Wine, 1933-1949



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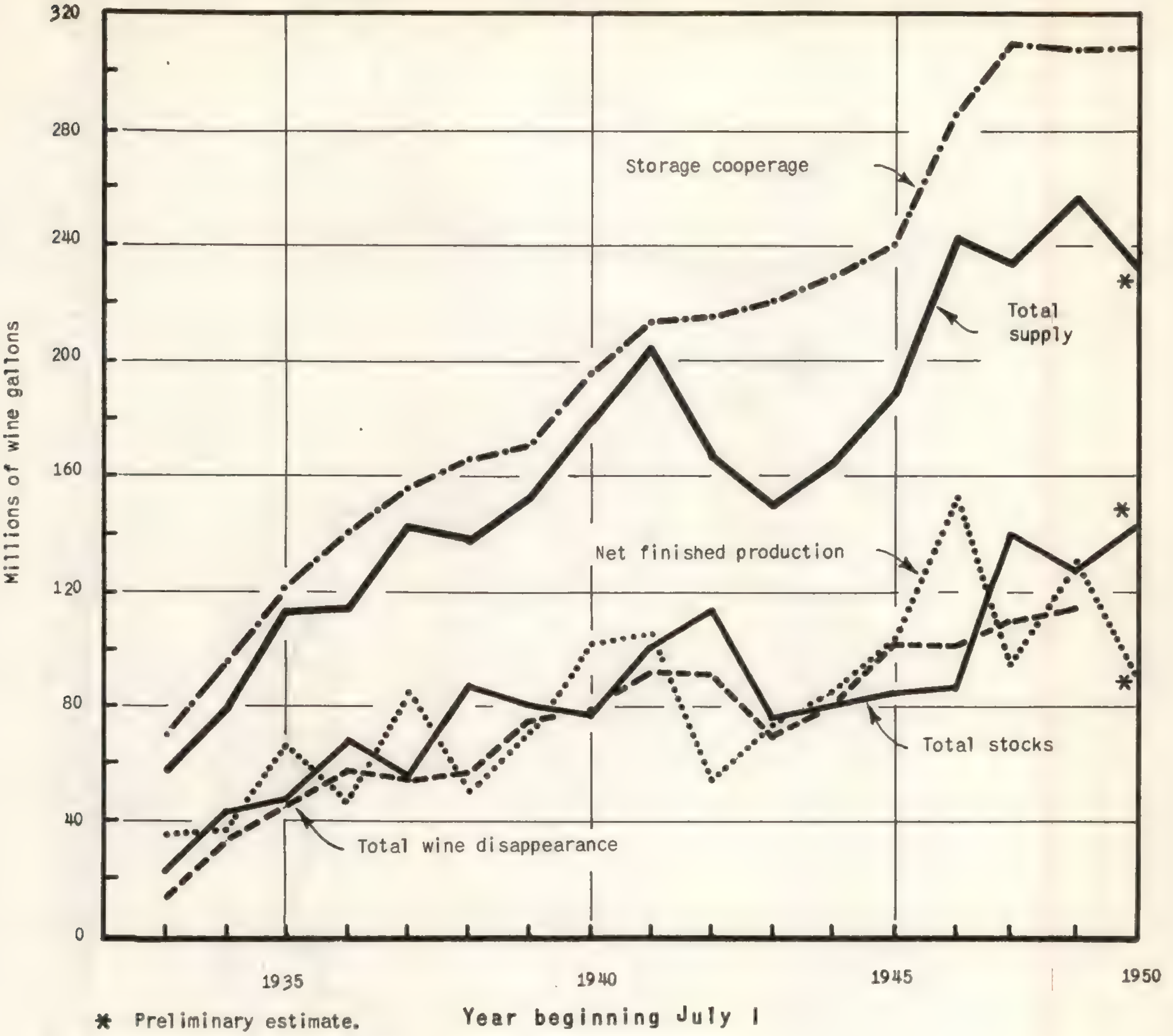
gallons in 1948. Total supplies during the year 1949-1950 will probably be less than 180 million gallons. Total supply has increased at a faster rate than disappearance. This has been necessary in an expanding industry. There appears to have been a remarkable stability in the rate of increase in production and in the long-run relationships prevailing between stocks, production and disappearance.

The structure of the commercial still wine industry as a whole is summarized in Figure 57. From storage and fermenter cooperage of about 70 million gallons in 1933, the industry had reached a storage capacity of 310 million gallons by 1947. This is more than a four-fold increase in fourteen years. There has been no increase in cooperage in the last two years. Up until 1941, the rate of increase in storage cooperage and in total supply were almost identical. From 1933 through 1941, cooperage increased at about $17\frac{1}{2}$ million gallons per year and total supply rose at about the same rate. Capacity was expanded at the pre-war rate during the four years in which production was limited. Cooperage was increased at an accelerated rate in 1945 and 1946. The rate of expansion in cooperage thereafter leveled off as a result of the decelerated production of wine in the past three years as compared to 1946. The maximum total supply of all wines was reached in 1948, when more than 250 million gallons were available. Estimated total supply for the 1949-1950 year is between 230 and 240 million gallons. Net

Fig. 57. Total Production, Stocks, Supply, Storage Cooperage, and Disappearance of California Commercial Still Wine, 1933-1949



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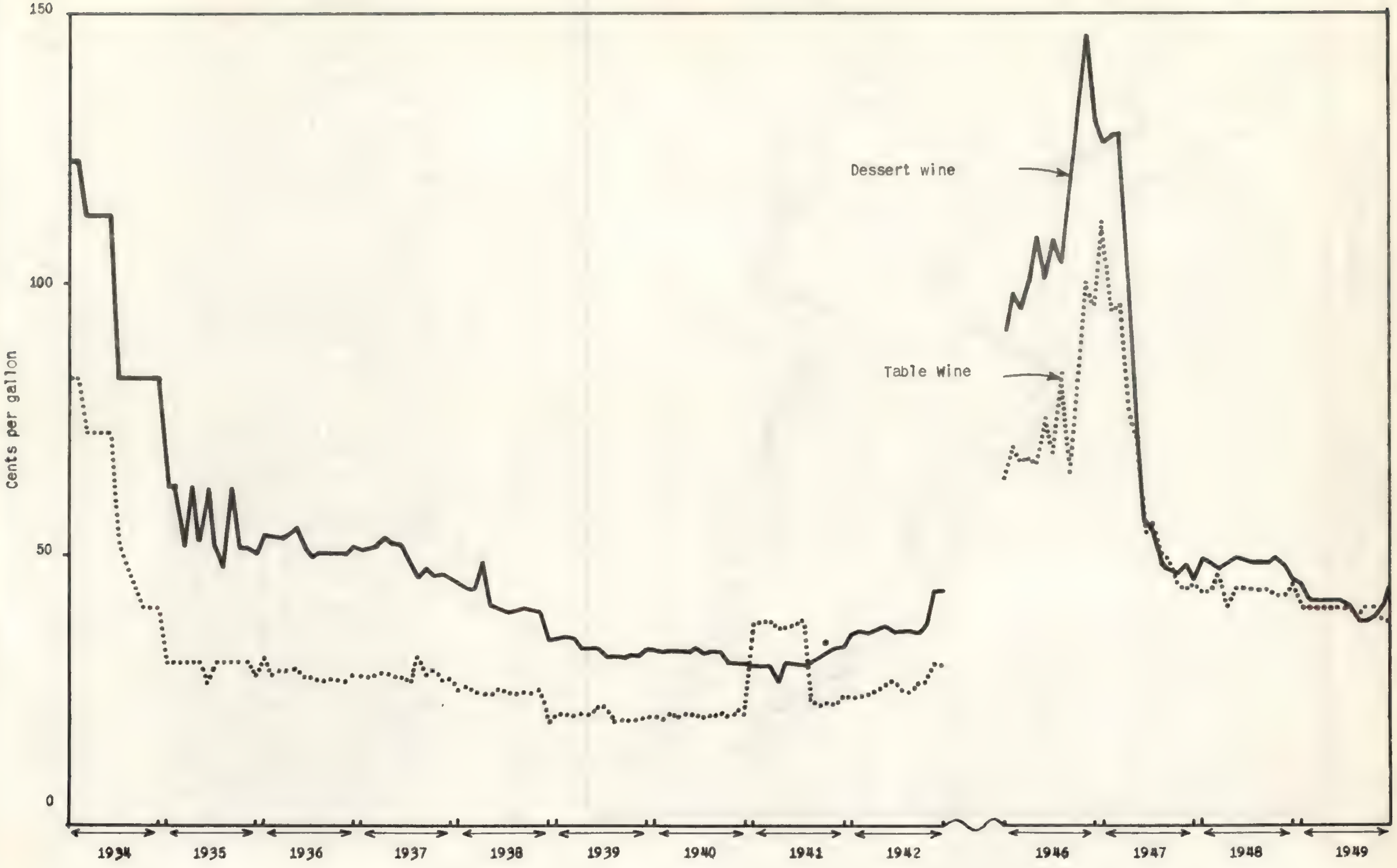
finished production of still wines has increased steadily since repeal but at a lower rate than either total supply or storage cooperage. Total stocks have run at about the same level as net finished production and total wine disappearance. Disappearance has been subject to less erratic annual variations. Net finished production for 1949 is roughly estimated at 85 million gallons. Net disappearance may run in the neighborhood of 120 million gallons. The immediate outlook is for relatively short stocks especially of dessert wines for July 1st of 1950. The size of the crush cannot be predicted. Total grape production cannot be predicted. However, grape production could range from 2,500,000 to 2,800,000 tons from the same acreage which has turned out production of this magnitude before. The outlook in other utilizations cannot be predicted, and this is a major determinant of the size of the crush.

Fig. 58. Estimated Average Monthly Prices for Bulk Dessert and Bulk Table Wines, F.O.B. Winery, 1934-1949



WINE PRICES: There is no official series for wine prices. In consequence, a series was prepared from a variety of sources. Several large wineries permitted access to their books in order to determine monthly average returns per gallon. A large banking organization and a federal lending agency also made their records available. Weights were assigned to the different components of the table wine series in proportion to their relative monthly withdrawals. The resulting average monthly prices series does not list the actual prices for bulk wine at the winery over the years 1934-1949. It is not possible to determine the degree to which the series deviates from the actual average prices. However, there was relatively little difference in the prices reported by the various collaborating agencies. Thus the price series should at least indicate the general drift, and roughly the relationship between dessert and table wines which has prevailed over the past fifteen years.

Dessert wine prices were more than $1.20 on the average for bulk wine f.o.b. the winery in 1934. Table wine prices were about 80 cents. Both sets of prices declined rapidly in 1934. Dessert wines settled down at between 50 cents and 55 cents until mid-year of 1937. Table wines averaged about 30 cents per gallon over that period. Then followed a slow decline in both classes of wine with dessert wines reaching a low of less than thirty cents in 1941. Table wines reached a low of 20 cents a gallon through 1940 and started to rise in early 1941 a few months ahead of the dessert series. Prices of dessert wines broke through one dollar per gallon in early 1946. By the end of 1946 table wine prices had broken through 80 cents per gallon. By midsummer of 1946 dessert prices were spiralling upwards. Table wine prices lagged a little behind in their rise. Dessert prices reached a peak of about $1.45 shortly after the crushing season. Table wine prices reached $1.10. This was the year of the heavy crush. Harvested production in California was nearly 2,900,000 tons. More than 1,600,000 tons were crushed in response to high winery prices and uncertain raisin outlook. Prices broke in both series. By the time of the 1947 crush, bulk prices for both types were below 50 cents per gallon. After the short crush in 1949, both price series turned up. Prices in 1950 will depend on a variety of circumstances. Inventories are short and rate of consumption is high. The outlook in the next year will, however, be affected by general business conditions, which cannot now be predicted. The size of the grape crop will affect the size of the crush. The outlook in the raisin and table-grape segments will even be more important.

III MARKET ORGANIZATION

INDUSTRY STRUCTURE: The production and marketing characteristics of the grape and wine industries are not unique to businesses using grapes as raw materials. Output of many perennial crops has increased over long periods. Nearly all such perennials vary widely in year-to-year production and such variation bears little relation to changes in market outlook. Fresh table grape shippers are in general required to start cars to markets on the basis of price expectations to which they may all react alike and thereby overfeed or starve this outlet for short periods. This problem of rate-of-flow and geographic distribution of fresh products is common to many industries. Sale of low-quality or poor packs in response to short-run market opportunity by a few shippers may and does damage the whole market not merely in grape products but in many other commodities. Even the multiple-use attributes of grapes, which so closely tie the various elements of the grape industry, exist to some degree in the canning industries, the milk industry and in other agricultural groups where well-developed by-products outlets exist. There are, however, at least two ways in which the grape industries differ from most of the other farm industries with all or some of these characteristics. First, there is a compelling tradition in the grape industries that all produced output -- even where residual to some major marketing channel or where damaged -- shall be used -- and even if price for all or most parts of the supply drops to the costs of harvesting and packing. Second, there is greater complexity in the structure of the grape industry than in most others -- in the sense that there are more integrated and interdependent parts among which there is rather easier shifting of raw materials than in most similar industries.

The grape industries have long recognized the three primary sources of instability in income which are attributable not to economy-wide factors like consumer buying power or to changes in consumer attitudes or to changes in the status of competing goods or other demand determinants, but rather to factors inherent in the grape industries and subject at least to partial control by the grape industries. First, there has been the necessity to expand markets as the technology of production continuously improved. Output from a constant acreage expanded faster than the market. Thus two types of trade promotion developed. Private advertising has been undertaken in all segments. Two of the segments have used state laws for industry-wide promotion. All elements of the industries have set up programs to control sales and thus free the market from the impact of uncontrollable variations in the annual supply of raw materials. One fresh table-grape deal has long controlled both rate of flow to the fresh market and minimum quality of shipments. The raisin and wine groups have both developed supply control programs and both are inquiring into quality control. The wine industry has availed itself of resale price maintenance and loss leader laws.

This complex and extensive fabric of organization has not been developed out of a liking for the frictions and occasional inequities which must accompany controls. They arise from necessity, which must be frequently demonstrated if the programs are to be maintained. Industry organization is by no means complete. It is difficult to appraise accurately in any specific situation the relative gain from stabilization as compared to lost individual control over enterprise. There are thus widely different views among persons, areas and enterprises with respect to the fundamental desirability of industry stabilization. These are respectable differences which are slowly being resolved. The biggest gap in the fabric is the inability to protect the major utilizations against flood induced by short supplies and high prices, which lead growers to flood one outlet and short another. This section describes the major programs of which the grape industries have made use.

THE CALIFORNIA MARKETING ACT OF 1937: Two state laws authorize control over intrastate handling of grapes or wine. However, the Agricultural Producers Marketing Act may not be applied to grapes grown in the thirteen coastal counties. The California Marketing Act of 1937 -- a police power act to prevent economic waste, develop more efficient and equitable marketing methods and maintain agricultural purchasing power -- authorizes programs to correlate sales and demand, establish orderly marketing, facilitate uniform grading and proper preparation for market, hold or expand markets and eliminate or reduce economic waste. Upon finding from the transcript of the required public hearings that proposed regulations will tend to achieve these objectives and are approved by the industry then with the aid of Industry Advisory Boards the Director of Agriculture may effectuate programs to: (1) measure and control surpluses (except for hermetically sealed products) and equalize their burdens; (2) limit quantities handled in total or by grade or size; (3) allot amounts acquired from producers; (4) allot amounts handled; (5) establish marketing or processing periods; (6) establish surplus, stabilization or by-products pools, sell their contents and distribute net returns, arrange and operate financing and other collateral functions, and levy assessments to raise stabilization funds; (7) set minimum standards not below those defined in the Agricultural Code, and establish grading and inspection services; (8) advertise, promote sales or lessen trade barriers; (9) prohibit unfair practices; (10) finance tree or vine removal on low-yielding acreage; (11) engage in research. Programs directly affecting only handlers or growers need be approved by a large majority of handlers or growers respectively. Both groups must approve if both are directly affected. Procedures and conditions for collection and disbursement of administrative, advertising or stabilization funds are carefully specified. Enforcement is effectuated through the authority of the state goverment.1/ Under this law, there are four programs affecting grapes or wine.

THE MARKETING ORDER FOR WINE: An Advisory Board of nineteen processor members administers this order, assisting the Director in assessment, collection and administration of funds; in collection of necessary information and in cooperation with other California grape programs. An Advertising Subcommittee of seven members of the Advisory Board assists the Director in advertising, dealer service, trade promotion, publicity, market development and expansion, prevention or modification of trade barriers (including negotiations with governments) and research into wine distribution. Under both the governing statute and this order, advertising matter may not contain false or unwarranted claims, refer to trade or brand names or disparage other farm products. Assessment rates may not exceed one and one-half cents per gallon on dessert wine and three-quarters of one cent on table wines nor four per cent of gross dollar value. The order is effective until June 30, 1951 unless sooner terminated as provided in the Act.2/ The Marketing Order for Wine has been extended three times since its initiation on October 24, 1938.

The Board, its Manager and the Director of Agriculture administer national sales promotion campaigns, distribute point-of-sale advertising material, supervise field personnel in all large wine markets, develop educational programs, attempt to lessen trade barriers, and conduct research in medical aspects and market distribution. Two members of the Subcommittee on Advertising review all trade promotion matters. Offices for sales promotion and supervision of six Western and Mountain states field representatives are located at San Francisco. Eight field representatives work out of the Central Division offices in Chicago

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1/ See Appendix D, Part 1 for a detailed summary of this statute.

2/ See Appendix D, Part 2 for a summary of the Wine Marketing Order.

and six under the Eastern Division office at New York City. The Board's Sales Promotion Department either acting directly or through its advertising counsel, which has been retained continuously since 1938, prepares and distributes point-of-sales material and booklets. The Wine Institute, under contract to the Advisory Board, studies production, sale, distribution and consumption of grapes and wine, maintains continuous marketing surveys and operates publicity programs and a wine study course.

Assessments are collected at the maximum permitted rates of one and one-half cents per gallon on dessert wines and three-fourths of a cent per gallon on table wine prepared for market. The total budget for 1948-49 was a little more than $1,500,000. Major items were: national advertising, $736,000; advertising printed materials, $105,000; field staff, $128,000; marketing surveys, $169,000; research, $83,000; wine study course $56,000; administrative expense, $142,000. It is expected that about the same budget will be expended on similar activities in the future.[1]

THE MARKETING ORDER FOR RAISIN PROCESSORS: This order, which became effective on June 28, 1949, is intended to increase demand for raisins processed within California. An Advisory Board of seven processor-members, financed by an assessment rate of $1.00 per ton, may administer programs to expand sales, hold or create markets, assemble and present market information, negotiate with governments or contract for research in production, processing or marketing of raisins. Two advertising agencies have been engaged. The 1949 campaign was aimed towards expanding utilization of raisins in the confectionery outlet and by bakeries, which once used about half the volume of raisin production. Both a National and a Regional Raisin Harvest Festival were coordinated with trade-journal advertising, point-of-sale display and consumer-pack promotion. The Board took part in the 1949 Baking Industry Exposition. It has activated a Bakery Service Department to contact and assist bakers in production, merchandising and promotion of raisin bakery goods. A nation-wide Raisin Bread Contest was held. Recipe research and publication were conducted through the California Dried Fruit Research Institute. Studies of distributive and manufacturing outlets, of consumer habits and preferences and of trade inventories were undertaken with the United States Department of Agriculture and the California Bureau of Markets.[2]

The Director of Agriculture must approve all contracts, rates, commissions and payments upon audited claims for both the wine and raisin advertising orders. There has been extensive discussion of grower participation in the raisin advertising program.

TABLE GRAPES: There is no industry-wide program for expansion of demand for table grapes, although individual shippers advertise for their own account. The Tokay Marketing Agreement, as a federal instrument, does not provide for demand expansion. Producers of Emperor grapes rejected a proposed federal order in 1948. A tentative draft of a proposed state marketing order setting seasonal minimum grades of midsummer fresh grapes excepting Tokays and Emperors but not providing for trade promotion has been circulated. Truck-posters advertising fresh grapes were displayed in a few cities in September 1949 by the California Grape and Tree Fruit League and the United Fresh Fruit and Vegetable Association.[1]

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[1] Report of the Wine Advisory Board to the Grape Study Committee. December 9, 1949. San Francisco, Calif.

[2] See "Report of the Raisin Industry Program," by Paul L. Johnson, Manager, California Raisin Advisory Board, December 9, 1949 and "A Progress Report on the Raisin Industry Programs," February 27, 1950.

SUMMARY, ADVERTISING ORDERS: Industry-wide advertising programs are operating in two segments of the grape industry -- in wine for twelve years. Advertising of fresh table grapes has been widely advocated. Output of grapes has increased in all three sectors but per capita consumption of grapes through two of them has not increased. These are long-run programs intended to counter the long-run increase in annual production but not to adjust either to sudden changes in production or in demand. Other methods must be used for these purposes.

MARKETING ORDER FOR WINE PROCESSORS: This order, effective on June 20, 1949, provides a means to control the quantity of wine sold and shipped each year during the period July 1st-February 28th, inclusive, as and if necessary. Thus it is possible in some measure to mitigate the effects of irregularity in the production of grapes upon the volume and rate of wine sales.[2] After considering marketing policies for dessert and for table wines, separately recommended by two subcommittees each composed of five processors of the respective type of wine, the Advisory Board of seventeen processor-members must set out its own marketing policy by July 25th, and must further recommend to the Director the percentage of wine on hand as of July 1st, which may be prepared for market prior to the next March 1st.

The order is applicable to processors engaged within California on United States Bonded Winery, Storeroom or Field Warehouse premises for commercial purposes in receiving, grading, fermenting, distilling, preserving, grinding, crushing, or changing the form of grapes or grape products into wine or in receiving, grading, storing, aging or treating wine. Wine is defined as in the Internal Revenue Code and Regulations. Dessert wine contains alcohol in excess of 14 per cent but not in excess of 24 per cent by volume. Table wine contains from ½ per cent to 14 per cent alcohol by volume. Processing means producing wine; crushing grapes for wine; making must or pure boiled or condensed must from grapes for wine; fermenting grape must into wine; fortifying or blending wines; blending, filtering, clarifying, cellar treatment, aging, storing or warehousing of wine; and preparation of wine for market. Preparation for market -- to which the regulation applies -- means either placing wine in movable containers or removing wine from bonded premises, except solely for transfer to another bonded premise which is located within California and is owned by the processor, an affiliate or subsidiary and solely for the purposes of additional distilling, blending, filtering, cellar treatment or repackaging; and except when transferred to any other bonded premise solely for aging, storing or warehousing. Processing material wine -- used solely in the rectification of distilled spirits -- is not subject to these regulations. Free inventory is the quantity of dessert or table wine on hand or in transit on June 30th within California to a bonded premise, determined by physical inventory as prescribed by the Bureau of Internal Revenue. Acquired inventory is the quantity of dessert or table wine acquired from the free inventory of another processor between July 1st and the next February 28th. Reserve inventory is wine other than free

[1] Report of the California Grape and Tree Fruit League to the Grape Study Committee. December 9, 1949. San Francisco, Calif.

[2] See Appendix D, Part 4 for a summary of this order.

or acquired inventory but does not include the excess over free inventory in the event that the marketable supply is set at more than 100 per cent of free inventory. Any free or acquired inventory placed into movable containers in the processing of "processing material wine" is subject to regulation.

By July 10th, each processor must file a sworn statement of his June 30th free inventories of dessert and of table wine.[1] On or prior to July 20th, the Dessert and Table Wine Subcommittees must recommend to the Advisory Board the total quantity -- in terms of percentages of free inventory -- of each type of wine to be marketed in all or part of the marketing season. Data supporting this recommendation must be submitted to the Board. Then after considering the reports of the Subcommittees, the Advisory Board must prepare by July 25th a detailed marketing policy report in which the total quantities of dessert and table wine -- again in terms of percentages of free inventory -- to be prepared for market between July 1st and February 28th are separately recommended. At least three fourths of the membership of the Board must concur if recommended sales of either type are less than 90 per cent or more than 110 per cent of free inventory. Limitation to less than 80 per cent of free inventory for either type also requires approval by at least 65 per cent of directly affected processors who have returned ballots to the Director within fifteen days after being mailed by him. In making its recommendations, the Advisory Board must consider: The quantity of dessert or table wines available; free inventory; normal requirements for consumption; buying power; prices of competing goods; prices paid by farmers; and production and utilization of grapes. The Director must find that limitation of the quantity of wine prepared for market will tend to attain the goals of the California Marketing Act of 1937 and will not result in the marketing of less dessert or table wine than is needed by consumers. The marketable percentage of free inventory must be set by August 5th or by August 20th if a vote by processors is necessitated. The Director notifies the Advisory Board which in turn advises each processor of the percentage of free inventory and the quantity he may prepare for market. Between November 15th and November 30th, the marketing policy must be reviewed by the Board which upon concurrence of three fourths of its members may recommend, prior to December 1st, that the percentage of free inventory authorized for sale be increased. If such a recommendation is accepted by the Director, he must adjust the revised quantities permitted to be sold by a uniform rule on or before December 10th, if possible. The order specifies that no processor could prepare for market between July 1, 1949 and February 28, 1950 more than 100 per cent of his free inventory on July 1, 1949 plus free inventory acquired from other processors. The order authorized preparation for market of 100 per cent of free inventory for the period July 1, 1949 to March 1, 1950. Assessments may not exceed one tenth or one twentieth of one cent per gallon on dessert or table wines respectively. The 1949-50 budget was $96,300 including contingency reserves. Administrative expense may in no case exceed 2½ per cent of gross sales by processors. One suit attacked the order as unconstitutional and discriminatory. The Court ruled that no valid case was at issue.

This order aims primarily to protect wine sales against changes in wine production -- where such changes are often due to heavy production or poor market outlooks in segments over which wine processors have no influence. It may also discourage sale of green wine. Handlers of wine with no inventories as of July 1st are free to purchase from free inventories of other processors. The program is simple. It is inexpensive to operate and to enforce. Differences in production and marketing conditions between the two broad types of wine are recognized. There is a minimum of interference with the business judgment of vintners. While the open period from March 1st through June 30th may have disadvantages, it provides for flexibility in the operations of processors. The order does not, however, protect the wine industry against the effects of excessive or erratic variations in the tonnage of grapes crushed.[1] In short, sales of wine can be controlled through this instrument, but not production or inventories.

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[1] On December 8, 1949 the Board recommended an additional inventory report each year as of December 31. The Director added this requirement through amending the Operating Rules and Regulations as of December 29, 1949. Each processor reports monthly on his inventory position and a perpetual inventory record is maintained by the Board.

THE MARKETING ORDER FOR GRAPE STABILIZATION: a. THE ORDER. -- This order, effective September 16, 1949, regulates grapes and grape products eligible for diversion for stabilization purposes and defined to include: dessert wine; table wine; brandy and high-proof, distilled wine, products or residues of grapes containing more than 24 per cent alcohol by volume; processing material wine, used solely in rectification of distilled spirits and grape concentrate, dehydrated or partially dehydrated must except as used in nonalcoholic beverages. Raisins are not included. Regulation applies to "preparation for market" -- which means either placing wine, brandy, high-proof or grape concentrate in movable containers or removing such products from bonded or other premises except for removal to other premises within California for additional processing and except for removal of processing material wine.[2]

The order is administered by an Advisory Board of nineteen processors assisted by a Growers Advisory Subcommittee of thirty-five producers. The Board has two broad functions: first, the establishment and operation of surplus-diversion facilities and second, the conduct of research.[3]

The Board itself either investigates or arranges for the investigation of marketing conditions affecting grapes or grape products. It may determine the surplus by varietal class or by utilization, referring at least to these standards: available or forthcoming supplies of table, raisin and wine grapes; inventories of wine and other grape products; raisins; demand for grapes and grape products; current and prospective prices; and other orders, programs, laws, funds or other factors which might affect the supply or utilization of grapes or grape products. After consultation with the Growers Advisory Subcommittee, the Advisory Board may recommend to the Director the quantity of grape products or of grapes by varietal class which should be acquired for diversion with stabilization fund monies. If funds are adequate, the Board may recommend with concurrence of at least two thirds of its members the establishment of a surplus-diversion pool to receive, handle and dispose of surplus grapes or grape products. When the Director finds that such a proposed diversion pool is reasonable and consistent with the goals of the law, he may authorize the Board to take title to any grapes or grape products received and to operate the pool. With approval by the Director, pooled supplies may be disposed of in noncompetitive channels as the Board finds consistent with maintenance of a stable market. Expenses of pool operations are borne by administrative funds available for that purpose and from net proceeds from sales. Net proceeds may be credited to a revolving fund to be used either in stabilization operations or to be prorated back to processors.

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[1] See Report on Marketing Order for Wine Processors to Grape Study Committee. December 9, 1949.

[2] As of March 15, 1950, minor amendments were effectuated clarifying the meaning of "preparation for market" specifically to exclude transfer to a vinegar works for processing into vinegar and further to exclude transfer of processing material for distillation in consonance with the intent of the Marketing Order for Wine, for Wine Processors and for Grape Stabilization.

[3] See Appendix D, Part 5 for a concise summary of this Order.

With approval by the Director, the Board may conduct or cause to be conducted research into production, processing or distribution of grapes or grape products. These studies may include analyses of causes of surpluses, methods of eliminating surpluses and procedures for stabilization in the whole industry or in one or more of its segments.

For the purpose of acquiring grapes or grape products, the Board may recommend assessments not exceeding six cents per gallon on high-proof or brandy, three cents per gallon on dessert wine and one cent per gallon on table wine. Administrative and research assessments may not exceed one fifth of one cent per gallon on brandy, high-proof and grape concentrate; one tenth of one cent per gallon on dessert wine and one thirtieth of one cent per gallon on table wine. Advance assessments up to 25 per cent of these maximum limits are authorized. The Board may augment funds through federal or other agencies and may further hypothecate stabilization funds or either the contents of the stabilization pool or by obligations to it.

Advance assessments of 25 per cent of the maximum allowed rates for stabilization and the full administrative and research assessments were collected. Operating rules and regulations were made effective on October 1, 1949 and amended on January 9, 1950 to authorize establishment of a surplus diversion pool, assessments for stabilization funds and definition of proof gallons.

b. EFFORTS TO OBTAIN STABILIZATION LOAN. -- Many activities intended to contribute to the two goals -- research and stabilization -- have been undertaken.[1] An application was submitted on September 26, 1949 for a loan of $3,000,000 from the United States Commodity Credit Corporation secured by the obligations on vintners for stabilization assessment. The Grape Stabilization Advisory Board then considered that funds available for grape diversion through price-support of raisins by the Commodity Credit Corporation or through its own power to raise funds by stabilization assessments might be inadequate to eliminate the threatened 1949 surplus -- which fortunately did not materialize. It was therefore proposed that a federal marketing order be formulated, to provide for diversion of surplus grapes other than raisin varieties into noncompetitive channels. Nonrecourse loans to the extent of $3,000,000 were also requested. The single source of funds available to the United States Department of Agriculture was the 30 per cent of gross custom receipts of the preceding calendar year allocated to the Secretary by Section 32 of the Agricultural Adjustment Act of 1935, as amended. These funds must be used mainly to encourage exports, to increase domestic consumption through diversion from normal channels and to make production payments to producers on perishable nonbasic crops on which price support is not mandatory.[2] Representatives of the Stabilization Advisory Board were advised by the U. S. Department of Agriculture that benefit or diversion payments could be made only out of Section 32 funds; that diversion payments on

[1] See Report on the Marketing Order for Grape Stabilization to the Over-all Grape Study Committee, December 9, 1949. San Francisco, Calif.

[2] See Appendix D, Part 6, for a summary of Section 32 of the Agricultural Adjustment Act of 1935, as amended.

raisins constituted the maximum possible support for California grapes; and that all Section 32 funds were already committed. The Department considered that were funds available, neither off-grade grapes nor any grape products could be diverted through federal funds; that federal policy did not contemplate outright elimination of edible perishables; and that processing of grapes into grape juice for school-lunch use did not appear feasible.[1]

The request for a loan was authorized by the California Marketing Act which permits negotiations with federal agencies for funds to augment the stabilization fund and authorizing the Stabilization Board to hypothecate funds already received or due under stabilization-assessment obligations. Receipts of stabilization assessments over the next twelve months were to be used as security. Programs designed to stabilize the wine, raisin and grape industries were outlined. The purpose of the requested loan was to improve returns to growers either by diverting excessive tonnage of grapes from crushing or by removing excessive supplies of wine out of commercial channels. It was expected that 1,200,000 tons of grapes would be available for crushing -- an expectation which did not materialize only because the crop was short and the raisin outlet was both controlled and supported. Assessments were to be levied as wine was prepared for market. Funds would be needed mainly -- if at all - from about September 1st through November 1st in order to divert grapes from crushing. If diversion became necessary, the Advisory Board would contemplate several possible adjustments: diversion of packing house culls, strippings, wet damaged or other low-grade grapes; purchase on the vine of surplus or damaged grapes; diversion into noncompetitive by-products; removal of excess wine from inventory; and purchase and removal of intermediate grape products, such as juice or distilling material, as were feasible.[2]

The application of the Advisory Board was explained by an officer of the California Bureau of Markets, who described in detail the state wine order, their operations and the statutes under which they function.[3] On December 2, 1949, the Director of the Fruit and Vegetable Branch of the U. S. Production and Marketing Administration stated that the Board of Directors of the Commodity Credit Corporation would not favor a loan until assessments had actually been levied and collections initiated. It was therefore recommended that assessments be levied immediately in order to build up a fund for 1950 which "... would be one of the requirements for obtaining direct assistance from the Department, such as a CCC loan."[4] The loan proposal was declared to be "inapplicable to operations during the current season." It was suggested that if a loan were needed in 1950 that negotiations commence early in the season.

c. TAX-FREE DIVERSION. The Grape Stabilization Advisory Board also prepared proposals for discussion with the Alcohol Tax Unit of the U. S. Bureau of Internal Revenue to eliminate wine if necessary through a diversion pool without payment of tax.1/ Diversion could be effectuated through: dumping of wine; dilution with water to reduce alcohol and then dumping; distillation; export; denaturing by boiling or by concentration; vinegar manufacture; destruction as of unsalable grade; manufacture of dealcoholized wine; impounding for later removal; destruction as "unavoidable loss" under amended law. As the Internal Revenue Code now stands, no outlet for any significant volume of wine could be used free of tax. The Alcohol Tax Unit must impose the tax except where specific exemption is provided. Unspoiled wine may not now be diverted without payment of tax. Therefore, a bill was introduced which would authorize the Commissioner of Internal Revenue to declare wine unmerchantable and to authorize its elimination free of tax as unavoidable loss.2/ However, delegation to a federal official of power to determine unavoidable losses may mean invalid assumption of powers vested in the California Director of Agriculture by California law. Efforts are being made to resolve this apparent conflict. Unless and until it becomes possible legally to eliminate surplus wine without tax obligation the present rates of 15 cents and 60 cents per gallon on table and dessert wines respectively and $9.00 per gallon on distilled spirits will probably render such diversion excessively costly.

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[1] Grape Stabilization Advisory Board. Memorandum of conferences with U. S. Department of Agriculture Regarding Additional Funds for Grape Stabilization.

[2] Memorandum Application. To Fruit and Vegetable Branch, U. S. Department of Agriculture and Commodity Credit Corporation from Grape Stabilization Advisory Board. Subject: Fully secured loan of $3,000,000 for grape stabilization.

[3] Letter: W. J. Kuhrt, Chief, California Bureau of Markets to S. R. Smith, Director, Fruit and Vegetable Branch, U. S. Production and Marketing Administration, September 26, 1949.

[4] Letter: S. R. Smith to W. D. Sanderson, Acting Manager, Grape Stabilization Advisory Board, San Francisco 3, California, December 2, 1949.

d. STABILIZATION ASSESSMENT. -- Assessment for stabilization directly affects vintners only and may therefore legally be recommended by two-thirds of the members of the Grape Stabilization Advisory Board. Actual expenditure of the funds cannot be approved by the Director until a specific plan for a diversion pool and the economic report supporting its establishment have been approved by at least two-thirds of the membership of the Advisory Board. Certain products may not be purchased for diversion: raisins are not defined as a grape product; packaged fresh grapes might not be approved by the Director of Agriculture since they are an edible and already packaged product; subsidized exports of grapes or grape products may not be legally valid; destruction of sound ripe grapes is widely disapproved. Use of funds for vine removal involves a host of serious economic and administrative difficulties which are not yet fully analyzed. Diversion of culls or products residual to other shipping operations, or vineyard strippings or other damaged grapes through stabilization payments as and if necessary has been suggested as a phase of the accepted policy to eliminate lowest quality raw materials.

The Committee on Research Procedure of the Grape Stabilization Advisory Board requested the Giannini Foundation of Agricultural Economics to analyze the stabilization fund.3/ The Giannini Foundation recommended immediate assessment but deferred use of the funds. The stabilization fund must be regarded as a reserve for contingencies -- mainly associated with heavy offerings of grapes for crushing -- to be available for use if needed and to be returned to vintners if not so needed. Such funds may usefully be disbursed only if they

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1/ Grape Stabilization Advisory. Report on Conference with Alcohol Tax Unit on Removal of Surplus Wine--Tax Free. Washington, D.C. Week of September 26, 1949.

2/ H. R. 6320. 81st Congress. 1st Session. October 4, 1949. To clarify and extend the authority of the Commissioner of Internal Revenue with respect to unavoidable losses of wine.

3/ Shear, S.W. and H.R. Wellman. The Grape Stabilization Fund. Considerations as to Its Collection and Use. November 25, 1949. 6p. Processed.

are available when needed. Only funds which have been collected and loans secured by assessment-obligations can be used to divert grapes. Loans cannot easily be obtained unless stabilization assessments have actually been collected. Surplus diversion pools may be established only if adequate funds are available or may be obtained. The order does not require--and could not reasonably require--that precise plans for use of stabilization funds be formulated at the time of collection. Many different contingencies may arise and a variety of diversion techniques may therefore be appropriate. None may be effective, however, unless the contingency fund is available should an emergency materialize. There is no indication that surplus diversion of grapes or grape products other than liquidation of the surplus raisin pool will be necessary at least until crop and market conditions affecting the 1950 crop become known--and not even then unless crisis situations develop either in production or marketing or both. Stocks of old wine and brandy were larger on September 1, 1949 than on September 1, 1948 by the equivalent of about 100,000 tons of grapes. However, the light 1949 crush and accelerated sales since September 1949 resulted in smaller stocks on January 1, 1950 than a year earlier. Thus, unless there is heavy production or poor market outlook or both in any segment, or the federal government sharply cuts down raisin support, there should be little need for stabilization in 1950. These contingencies cannot be foreseen. However, none of them is impossible. Should such emergency occur, it could be mitigated only if the funds were already available to finance diversion and to facilitate obtaining additional money through credit if needed. For these reasons, and further because more wine could be eliminated through diversion of grapes than through diversion of wine, the Giannini Foundation recommended that the assessments be levied and funds be collected either to finance surplus diversion and to serve as a basis for federal loans, or to be refunded if not needed. On December 28, 1949 the Grape Stabilization Advisory Board recommended to the Director of Agriculture that stabilization assessments be levied. Assessments at the rate of one cent per gallon on table wines, three cents per gallon on dessert wines and six cents per gallon on brandy, highproof and concentrate were approved by the Director and made effective as of January 9, 1950 to run through December 31, 1950.

e. PRELIMINARY REPORT, SPECIAL STUDY COMMITTEE.--This agency of the Grape Stabilization Advisory Board recommended that stabilization assessments be levied at maximum rates, 1/ but be used only for direct stabilization within the wine industry, specifically excluding purchase of raisins or packaged fresh grapes, payment of export subsidies or destruction of sound, ripe grapes. The Special Study Committee recommended study of vine pulling, despite its awareness that a marketing order which had been approved, financed and administered by growers would be necessary. If vine pulling were demonstrated to be desirable and practical, an amendment was advocated facilitating assistance by the vintners to such a grower-controlled program. Amendments were recommended, authorizing, by varietal class and district, both permanent minimum standards of quality to be met by all grapes received for crushing and sliding seasonal standards of quality through which the tonnage crushed could be controlled in volume and constituency. It was expected that stabilization funds could be used to finance inspection and diversion of grapes which could qualify under permanent minimum standards but did not meet the seasonal standard. The general policy from which these recommendations stemmed--to assure that if limitation were necessary, the least desirable grapes would be eliminated--has been reaffirmed often. The general policy of the Board may thus be summarized: to maintain a stabilization fund, augmented by credit from other sources if necessary and desirable; use of funds directly within the wine industry; unequivocal specification of uses to which funds may not be

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1/ Report of Special Study Committee. Grape Stabilization Advisory Board December 28, 1949. 3p. Processed.

put; facilitation of acreage adjustment as possible; use of quality limitation to effectuate limitation as possible; elimination of wine if necessary only after lifting of the tax obligation through amendment of the Internal Revenue Code; and frequent statement of general stabilization policies guiding the recommendations of the Board.

f. MINIMUM QUALITY.--It was hoped that minimum standards of quality in terms of sugar and of defects could be used to eliminate tonnage and simultaneously to improve quality of wine. However, sugar content varies in significance for various utilizations and for different classes. Standards which differed as among table wine, dessert wine, distilleries or other outlets could not easily be policed. Such standards must be directly relevant to the quality of the controlled commodity. Sugar content is apparently not unequivocally related to quality of distilled spirits. The second possible basis for permanent or seasonal standards was defects. Inspection and certification for freedom from defects requires skilled inspectors. They would be almost impossible to enforce without serious interference with normal commercial operations. Therefore, a committee was established by the Grape Stabilization Advisory Board to work with technologists, state officials and the Giannini Foundation to appraise the possibilities of formulating minimum standards for use in the 1950 crushing season.1/ The full information necessary to recommend promulgation of permanent minimum standards was not available. Establishment of opening or closing dates appeared to be an alternative way to control quality of grapes received for crushing.2/ Tentative conclusions were reached that relatively little volume would be eliminated through defining the crushing season. However, very early receipts in parts of the Central Valley appeared to be comprised largely of culls from fresh shipping operations and to be low in sugar. Wine grapes would not be affected by closing or opening dates. The small-volume, low-quality receipts of grapes protracted for as much as two months after the peak of crushing are comprised mainly of residues from fresh shipping operations. Thus, definition of a crushing season to which commercial operations would be restricted is a means whereby relatively low volumes of low-quality products may be eliminated. Equity issues are involved in application of opening dates since some fresh operations depend on winery outlets. Closing dates should involve less difficult equity problems.

g. SEASONAL QUALITY.--The Special Study Committee also studied the feasibility of controlling volume crushed by limitation of crushing each season to particular grades of grapes by variety and district as a phase of its general policy that where limitation is necessary, grapes adversely affecting wine demand should be first eliminated.3/ Quality standards to control volume must have several attributes: one or a few standards should be sufficient; inspection, grading and certification should be inexpensive and compatible with normal

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1/ Minutes of Meeting. Special Study Committee. Grape Stabilization Advisory Board. 3p. Mimeographed. January 30, 1950. p. 2.

2/ Sections E and F, Amendment #2. Proposed amendments to the Marketing Order for Grape Stabilization. California Bureau of Markets. Draft of March 23, 1950. p. 6.

3/ "...also that the Board consider the adoption of seasonal sliding scales so that standards above the minimum standard could be set to meet crop conditions and that consideration be given to the use of Stabilization Fund monies to purchase and divert grapes higher than the minimum, but which fail to meet the seasonal standard." Draft of Recommendations to the Grape Stabilization Advisory Board. December 12, 1949.

grower and vintner operations; there should be no serious inequities as between varietal classes, areas, times of the season, utilization and types of operations; a small change up or down in the standard should bring a small and calculable change up or down in the tonnage eligible for crushing; an entire varietal class or outlet must not be snuffed off by a small rise in the seasonal standard. The quality-attributes of the grapes must be closely related to the quality of wine in order to meet the reqirements of the law. The quality standard must also be meaningful and enforceable with respect to each of the dry wine, dessert wine, distilled spirits or other products outlets. While data necessary to appraise the probable effects of using quality standards could not be gotten prior to 1950, committees were designed to inquire into alternative methods.

h. RECOMMENDED AMENDMENTS.--On December 28, 1949 a Special Study Committee of the Grape Stabilization Board was established to inquire into possible amendments, especially permanent minimum standards and flexible seasonal quality standards. After consultation with several other study agencies the Committee recommended as follows: that no effort be made to effectuate permanent minimum standards at present but that research continue; that experiments testing the operational feasibility of minimum standards be conducted in 1950; that authority to establish opening and closing dates after a two-thirds majority vote be given to the Board; that no dehydrated grapes be used in wine; and that the Board be authorized to determine a diversion percentage separately for wine and non-wine varieties of grapes.1/ It is doubtful that these proposals will be submitted to referendum in 1950.

i. SUMMARY--GRAPE STABILIZATION BOARD.--The Advisory Board has been quite active during the several months in which it has operated. After failure to obtain a Commodity Credit Corporation loan because stabilization funds were not available as security and as token of willingness by the industry to help itself, the Board levied stabilization assessments at the maximum levels to collect a fund of approximately three million dollars. This fund may be used for diversion in 1950 as and if needed. The Board has carried on continuous research into the economic aspects of eliminating low-quality grapes and into alternative methods whereby tonnage crushed may be limited if necessary. Arrangements were completed for preparation of a report on 1950-51 marketing control programs. Tentative arrangements have also been made for long-run inquiries into basic economic problems facing all the grape industries.

PRICE POSTING FOR WINE: Legal authority exists in both state and federal law for resale price maintenance of wine sold in a branded container. The Miller-Tydings Act and the underlying state laws together assure exemption from prosecution under the Sherman Act or the Federal Trade Commission Act for contracts stipulating resale prices or requiring agreement for resale price maintenance by

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1/ Report of Special Study Committee of Grape Stabilization Advisory Board. February 28, 1950. See also Amendment #1, sub-sections "e" and "f" of Section A of Article I, defining wine and non-wine varieties to which all suggested regulations would be applied separately. California Bureau of Markets. Proposed amendments to the Marketing Order for Grape Stabilization. Draft of March 23, 1950. p. 1. The same set of proposed amendments specified standards for determining grapes or grape products in surplus by major varieties and by utilization, and after consultation with the Growers Advisory Sub-Committee to recommend to the Director the quantities to be acquired with stabilization funds. Uniform diversion percentages separately for wine and non-wine varieties were also proposed. The amendments were tabled on April 18, 1950 by the Advisory Board.

the buyer. 1/ These laws also define advertising, offering to sell or selling at a price other than that stipulated in the contracts as unfair competition. Sale below cost or locality price-discrimination is prohibited by the Unfair Practices Act. 2/ The California Alcoholic Beverage Control Act provides that no contract shall be illegal merely because the buyer guarantees resale price maintenance or because resale price is stipulated by the seller. Willful sale at less than the contracted price is unfair competition and is actionable at the suit of any person damaged thereby. It is provided that all distilled spirits shall be sold under contract and no licensee may violate such contract. Manufacturers of distilled spirits and brandy, rectifiers and wholesalers must file and maintain price lists and sales must be made in compliance to such lists. 3/ Except for wine sold in bulk and not bottled by the seller for the purchaser, extra-California sales, inter-corporate sales among related companies, sales to growers, rectifiers or consumers for on-premises consumption, to other wholesalers without control over brand or to a primary distributing agent who has posted scheduled prices, wine may be sold or resold only at prices stipulated in effective posted price schedules or in effective fair trade contracts. 4/ Price schedules must be posted on controlled brands if resale price is not controlled by a fair trade contract. Wholesalers must post selling prices if brands are controlled or if they are primary distributing agents or if resale price is not governed by a fair trade contract. Extra-California sellers must designate a California licensee to post prices to wholesalers and must designate a licensee handling imported wine to execute a fair trade contract and to post prices. Off-sale retailers controlling brands must also post prices. The contents of schedules of selling and resale prices are specified in detail. Selling price schedules must indicate the basic case price to wholesalers and retailers and the bottle price to consumers. Resale price schedules per basic case to retailers and by bottle to retailers and consumers must also be shown. Discounts are limited to specified reasons and must also be shown in posted schedules. Fair trade contracts must also show this same information. Either posted price lists or contracts may be changed by filing revisions either upward or downward between the first and tenth days of each month or in order to meet competition only. Prices may be revised downward only to the level of competition but no lower up to the twentieth day of the month. Such changes become effective on the first day of the next month. Posted prices are available for public inspection by the fifteenth day of the month. Except for producers selling only to consumers at licensed premises where prices are posted, price schedules or authorized changes therein must be published or distributed by mail. Closeout or damaged good sales are authorized only by permit from the Board of Equalization. Price discrimination and sales below cost are prohibited.

Thus vintners owning brands may avail themselves of the same protection against below-cost sales accorded to all handlers of branded products. They must specify selling and resale prices. They are thereby able to prevent precipitous declines in price and further to protect brands as symbols of price and quality. The

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1/ See Appendix D, Part 7 for a concise summary of the Fair Trade Law. The Miller-Tydings Act - Pub. No. 314, 75th Congress, 1st Session, 1937 (15 USCA) - makes such contracts binding in interstate commerce.

2/ See Appendix D, Part 8.

3/ Appendix D, Part 10.

4/ Appendix D, Part 10.

economic effects of such price techniques have not yet been adequately analyzed. There may be cumulative and retaliatory monthly decreases in prices. Rigidity in prices may constrict sales at consumer levels. However, assurance of stability to handlers may induce more aggressive handling than could otherwise be attained.

The wine industry has achieved a variety of techniques to stabilize returns under state law: long-range industry-financed advertising of wine and raisins designed to lift long-run demand as the trend of total production continues upward; control over the volume of wine sold; collection of funds for diversion of grapes from wineries; provision for research into causes and control of surpluses in any part of the industry. In addition, there are several federal programs affecting the raisin and table grape segments.

THE AGRICULTURAL MARKETING AGREEMENT ACT OF 1937: This statute is intended to assure orderly marketing of designated commodities, including grapes and both raisins and wine as products of grapes, within interstate or foreign commerce. The goals of the act are the acheivement of parity prices, the protection of consumers and the maintenance of minimum standards of quality and maturity. Agreements are voluntary contracts between the Secretary and handlers of any product and may contain any terms not otherwise illegal. Orders are applicable after prescribed procedures for proposal, formulation, hearing and approval by producers and handlers--or under unusual circumstances without approval by handlers--to milk, fruits, nuts, vegetables and specified general crops and their products except for canning or freezing. These orders apply to the entire production area and enforcement is obtained through the federal courts. No federal order may regulate, prohibit or in any way affect advertising. Orders may provide for limitation of amounts handled by class or in total; allotment of amounts acquired or handled by handlers; measurement and disposition of surpluses and equalization of their burdens; reserve pools; inspection; prohibition of unfair practices or methods; price filing; other necessary and consistent terms. Where intrastate trade has been found in public hearings to be an integral element in the flow of interstate or foreign trade, it too may be regulated through a federal program. Provisions for assessment and termination are also set out in the law. 1/

There have been several grape programs under this statute and the laws from which it developed. A program providing for price filing and surplus control in raisins was effectuated in 1934. 2/ Tokay grapes were regulated for two years after 1933 under a program providing for quality control and rate-of-flow controls. 3/ Arkansas grapes were once regulated by grade and by rate of flow. 4/ Tokay grapes

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1/ See Appendix D, Part 11 for a summary of this statute. The basic differences from the state law are three: no provision for advertising; no provision for production control; no mandatory provision for handler approval.

2/ Agreement #44 and License #59.

3/ Agreement #11, License #9.

4/ Agreement #76, Order #25.

have been continuously regulated since 1940 by a program authorizing controls over quality, maturity, rate of flow and shipping. 1/ Wine has never been marketed or processed under a federal program although proposals for an order were considered in 1948. Two segments of the grape industry presently avail themselves of federal programs--Tokay grapes for fresh shipment and California raisins.

THE CALIFORNIA TOKAY ORDER: This order, amended twice, has been effective since 1940. There was an earlier federal program effective in the years 1933-1935. There are two production districts to which separate regulations may apply. An industry Committee of seven producers elected by growers from seven districts administers the program with advice from a Shippers Advisory Committee of seven shippers representing various factors in the industry. Specific duties and powers are assigned to the Committee in administering the program and in recommending regulations to be effectuated by the U.S. Secretary of Agriculture.

Each season an annual report must be published outlining expected production and marketing conditions and the regulations contemplated for the ensuing season. After reference to standards listed in the order, the Committee may recommend and the Secretary may make effective regulations: limiting shipments to particular grades and sizes; establishing minimum standards of quality or maturity or both in terms of shipping quality, edibility, appearance, maturity or a combination thereof: regulating volume of daily shipments through retention of cars at assembly or storage points, if grade-size regulation appears to be inadequate; regulation of volume through loading or packaging holidays and limiting shipments by truck. Provisions for administration, allotment if necessary, equity among growers and districts, reports and records and enforcement are detailed in the order.2/

The table-grape industry is organized both through cooperatives and trade associations which conduct regular advertising and promotional activities. The Tokay order is, however, the single organized table-grape program operating under law. This industry is closely related to the winery outlet. Since 1940, fresh shipments have averaged about 4,300 cars annually. The percentage of annual production shipped fresh has ranged from 27 to 61 and has averaged 38. This means that the percentage of total production used in wineries has varied violently. The program has had two broad goals: (1) to protect demand in the fresh outlet by enforcing minimum standards of quality; and (2) to regulate the average daily volume and to prevent either heavy gluts or famines. Harvesting and packing facilities have expanded rapidly. For this reason, rate-of-flow regulation has been re-enforced by packaging holidays authorized by a 1941 amendment. This procedure appears to have affected picking and packing operations adversely in some cases. Further, question has arisen with respect to the effects upon returns of retention of cars--most of which are already sold at shipping point either at railroad or cold storage assembly points. Preliminary discussion indicates that control over pack-out rather than release of cars may be desirable, although the proration aspects of such control could not easily be achieved. In consequence of these unresolved issues, the operation of the program has been submitted to study in an effort to determine the impact of existing procedures and to suggest alternative regulations.3/

1/ Agreement #93, Order #51.

2/ See Appendix D, Part 12.

3/ Minutes. Industry Committee. October 27, 1949, Lodi, California.

The grade regulation enforced until 1949 was U.S. #1 with tolerances for minor defects in the Florin area. The 1949 regulation permitted 2 per cent fewer defects than previously. The car-concentration plan is designed to smooth out fluctuations in daily shipments and to assure an average daily level of shipments which will not be too high. Cars may be held no longer than 72 hours. If concentration points are clogging up, packaging holidays may be invoked to prohibit packaging of grapes except for diversion to cold storage for shipment after the season ends. Loading holidays prohibit loading for shipments to rail assembly points. Together, the duration of such holidays may not exceed 48 hours. Wartime expansion of packing and shipping facilities has apparently resulted in a four-day shipping capacity taxing the capacity of a seven-day market.[1] In addition to the formal programs, the Tokay Industry has instituted thinning and other cultural activities designed to enhance quality.[2]

The close relation of this fresh deal to the wine outlet is obvious. Ten cooperative wineries, three large commercial wineries and several other plants have been built in the Tokay area. Tonnage of Tokays processed for wine is a small part of the total crush. However, this one regulated table unit exemplifies the impact upon wineries of the total table segment, which in recent years has diverted more than one-half of its total production to the winery outlet. Heavy production or low demand in its own or in competitive segments may result in heavy utilization in wineries.

THE FEDERAL RAISIN ORDER: This order became effective on August 18, 1949.[3] The Raisin Administrative Committee, made up of fourteen producers and processors, recommends to the Secretary of Agriculture regulations on all handling of raisins. An Advisory Board of forty-six producers and packers advises the Administrative Committee. After open meetings at which verbatim record is kept, a market policy must be formulated by July 5th and filed with the Secretary by July 15th. Copies are distributed to all directly affected persons. After reference to specific factors affecting raisin prices, the Committee may recommend the percentage of the amount handled in any or all classes of raisins as free tonnage, without restriction except for record keeping. Surplus tonnage must be held at all times under the control of the Committee to be disposed in specified noncompetitive channels only. Reserve tonnage may be sold back to handlers in whole or part up until June 1st either to the surplus pool or to free tonnage as determined by the Committee, at prices approved by the Secretary and not less than the average price on free tonnage by variety at the date of sale. Minimum grade requirements may be set for surplus or reserve tonnage. Either or both pools may be used as collateral for loans.

Lost export markets and heavy production had rendered large-scale government support necessary in the raisin segment. This, of course, diverted grapes which could have affected adversely either winery or fresh table supplies. Sequestration of the raisin surplus and equitable distribution of its burden were generally considered necessary for continuation of government assistance to the grape industries through purchase of raisins.

[1] Tokay Grapes and Tokay Marketing Agreement. Report of the Industry Committee to the Grape Study Committee. December 9, 1949. San Francisco, Calif.

[2] Summary of the 1949 shipping season. Tokay Marketing Agreement. Lodi, California. January 13, 1950. 5p. Processed.

[3] See Appendix D, Part 13. See also Title 7 Agriculture. Chapter X. Production and Marketing Administration. (Marketing Agreements and Orders) Part 989. Handling of raisins produced from raisin variety grapes grown in California. Administrative Rules and Regulations.

The raisin crop was allocated by varieties to the three pools as follows:[1]

	Free	Reserve per cent	Surplus
Thompson Seedless	49	20	31
Muscat and Valencia	66.6	33.3	0
Bleached (all varieties)	50	50	0
Sultanas	49	20	31

Thus nearly one-third of the Thompson Seedless raisin production was removed entirely from regular channels. About one-fifth went to reserve. The U. S. Department of Agriculture agreed to lend $60 per ton on reserve tonnage and further to make advance payment of $60 per ton on surplus tonnage against an $80 per ton subsidy under the Raisin Diversion Agreement.

The reserve pool was intended to provide flexibility. The prohibition of sale at less than the current average price plus carrying charges was intended to protect packers' and other handlers' inventory-values and thereby mitigate the price depressing effects of tonnage which was not unequivocally segregated from the market. Operating rules require report of weighted average prices by handlers.

Total 1949 production should be in the neighborhood of 265,000 tons.[2] On March 1st it appeared that most of the reserve tonnage would be used prior to June 1st in commercial channels. The Administrative Committee had sold all of the reserve Muscats, the bleached varieties and the Sultanas and about 50 per cent of the natural Thompsons in the reserve pools. Approximately 70,000 tons of Thompsons and Sultanas went into surplus pools. About one-half this tonnage had been sold by March 1, 1950. About one-half had been sold to the British Ministry of Food and the remainder mainly for livestock feed. Nearly $6.5 millions had been disbursed from reserve and surplus pool operations of which more than $3.5 millions was paid through advances of $60 per ton by the federal government on deliveries into surplus pools. The remaining $20 per ton of the federal subsidy and the expected return of somewhat less than $20 per ton on diversion sales will be paid out at the end of the season. On March 1, 1950 progress payments had been made of approximately $1.8 millions on sales from reserve of Muscats and bleached varieties, about $1 million on reserve Thompsons and about $50 thousand on reserve Sultanas.

Proposals for amendments have been circulated and it is expected that administrative frictions inevitable in any control plan, especially in the first years, will be lessened.

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[1] "Report of the Raisin Industry Program." Paul L. Johnson, Mgr. Federal Raisin Administrative Committee. December 9, 1949. p.3. The Secretary accepted the recommendations of the Committee except for Thompson Seedless, for which he increased the free tonnage and decreased the surplus percentage presumably on the basis of a revision downward in the estimated production of raisins from that variety of grapes. Both the order and the operating rules provide for deferral of meeting surplus obligation under safeguard of surety bond. Handlers may request that raisins damaged by rain or other natural causes be received by the Committee for disposition by the Committee without being charged against reserve or surplus obligation.

[2] "A Progress Report on the Raisin Industry Programs." Paul L. Johnson, Mgr. Federal Raisin Marketing Agreement. February 27, 1950.

RAISIN SUPPORT OPERATIONS: Raisins were purchased by the United States as a means of supporting the grape market as early as the 1935-1936 fiscal year. Authority for such purchase operations has rested on several laws, of which Section 32 of the Agricultural Adjustment Act of 1935 has been the most important source of funds.[1] There is specific authority for price support of grapes, raisins and wine in Title III of the Agricultural Act of 1949.[2] Support for basic commodities -- corn, wheat, cotton, rice, peanuts and tobacco -- is mandatory at levels not less than the sliding scales set out in Title I. Designated non-basic commodities -- wool, including mohair; tung nuts; honey; Irish potatoes; whole milk; butterfat and its products -- must be supported as specified in Title II. Other nonbasic crops -- in which grapes and grape products would be included -- may be supported at not more than 90 per cent of parity price insofar as funds are available after mandatory support requirements have been met. The Secretary must be guided in his decision to support nonbasic products by several standards: the supply of the product as against its market demand; supports on related products; availability of funds; national importance of the commodity; ability to dispose of stocks acquired in support operations; temporary loss of export markets; ability and willingness of producers to keep production or sales in line with demand. The Secretary may require compliance by producers with acreage allotments and with specified production goals and marketing practices as he determines necessary. These required practices may include marketing agreements and orders as necessary terms of eligibility for price support. The 30 per cent of customs receipts in the preceding calendar year made available about $100 millions each fiscal year for price support or other similar functions to be used mainly for nonbasic perishable crops not listed for mandatory support.

Raisin purchases for relief and substandard diversion from 1935-36 through 1938-39 never exceeded 15,000 tons per year. Since 1939-40, when nearly 75,000 tons of raisins were purchased mainly for relief, government has been a major purchaser of raisins.[3] The postwar purchase program is particularly impressive. Nearly 120,000 tons of raisins -- or almost a half million tons of grapes -- were diverted. Nearly 60,000 tons of raisins -- or a quarter million tons of grapes -- were so eliminated in 1948-49.

The diversion program in 1949-50 was integrated directly into the operations of the Federal Raisin Order. A Raisin Diversion Agreement was effectuated as a means to aid the grape industries through diversion.[4] Payments were made to the Committee at a maximum rate of four cents per pound natural condition weight on raisins meeting the minimum requirements set out under the federal order and set aside as surplus for diversion in approved channels.[1] Advance payments of a maximum of three cents per pound on surplus raisins properly stored and insured were authorized. All other net proceeds from handling surplus raisins must be held until the advance payments are cleared. Payments may be made on no more than 100,000 tons thus involving a maximum outlay of $8 millions for the year. Sales under the agreement are not authorized after June 30, 1950 and diversion must be accomplished no later than October 1, 1950.[2]

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[1] See Appendix II, Part 6.

[2] See Appendix II, Part 14.

[3] Recorded purchases are shown in Appendix II, Part 15. Operations in 1947-48 and in 1948-49 are shown in detail.

[4] See United States Department of Agriculture. Raisin Diversion Agreement, QMD 95a Amendment Number 1. Also see Exhibits A-B and 1-2. Fiscal year 1949-50. Diversion is authorized in Clause 2 of Section 32 of the Agricultural Adjustment Act of 1935.

Safeguards to assure proper diversion are set out in detail, including signed acknowledgement by the purchaser of full delivery and of use in designated channels. Net receipts of the surplus pool are prorated back to contributors at a uniform rate per ton. Uniform contracts are provided for all transactions. Liquidated damages paid by the buyer to the seller may be imposed for failure properly to divert ($200 per ton) and late diversion or non-diversion ($85 per ton).

Prorated payment to growers through April 3, 1950 from government advances on diverted raisins, and on sales from reserve and surplus pools amounted to more than $8 millions.[3] Nearly half the total surplus pool had been sold before March 1, 1950.

These raisin programs have been the single method whereby the federal government has supported the grape industries. They extend -- under various legislation and policies -- back some fifteen years and have accounted on occasion for large fractions of total raisin production. Government operations are intended to benefit all elements of the grape industries through shortening supply in the one segment whose major raw product may be utilized as grapes, wine or raisins. There seems to be little disagreement that industry-wide benefit is obtained through raisin support. However, the relative effects of diverting raisins upon table grape, wine and raisin operations are not yet assessed.

PROPOSED GRAPE PROGRAMS: In addition to the six marketing orders, the price posting and price-support operations discussed above, several other programs are currently being discussed. Expansion of raisin advertising to acquire larger funds and to include growers as contributors and in management of advertising is being considered. Sales promotion for fresh table grapes on an industry basis has been discussed but no indications of imminent effectuation are apparent. A tentative state order for grade control for midsummer fresh grapes (not including Tokays, Almerias and Emperors) has been circulated.[4] A board of eight growers and five handlers from five districts would be authorized to limit shipments by varieties to particular grades ranging from the minima in the Agricultural Code to U.S. No. 1. Proposals have also been drafted to amend the Grape

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[1] Processing into industrial alcohol, livestock feed or pharmaceuticals; direct livestock feeding; other approved uses outside of regular channels.

[2] The period for utilization of diverted raisins was extended to October 31 in order to assure a year-round supply to animal feeders.

[3] Periodic reports of operations under the marketing order and the diversion agreement are available in the Raisin Industry News, published by the Federal Raisin Administrative Committee. Fresno, California.

[4] Proposed Marketing Order for California Fresh Table Grapes.

Stabilization Order in three ways: (a) definition of wine and non-wine grapes to which regulations could be applied separately; (b) establishment of surplus diversion pools for grapes or grape products with uniform diversion percentage; (c) establishment of crushing period.[1]

SUMMARY: Some segments of the industry have experimented with market organizations extending beyond cooperative structure over several decades. Some have been continuously under controls sanctioned by law since 1933. There are two advertising orders, wine and raisins. There are two wine controls, one over sale and one authorizing purchase for diversion of grapes or grape products. Tokays are the only fresh table deal under regulation. Raisins are regulated through a federal surplus-control order. Wine prices may be posted and resale prices controlled. Federal price support through raisin purchase dates back fifteen years. There are several proposals for extension of these programs to other commodities or other functions.

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[1] Proposed amendments to the Marketing Order for Grape Stabilization. State of California, Bureau of Markets. Draft of April 7, 1950 for consideration by the Grape Stabilization Advisory Board. 9p. Mimeo.

IV SUMMARY

Production of all varietal classes of California grapes increased heavily from 1931 to 1946, almost exactly doubling total supply in that period. The industry has not increased in terms of acreage. Yield per acre alone accounted for the full increase. The pattern of increase in yield indicates that its origin is technological and not related either to economic outlook or to weather. Therefore the capacity to produce total California crops ranging from 2,500,000 tons upwards must be acknowledged. As in all other perennials, year-to-year changes in yields per acre may place strain on the marketing mechanism by sudden, drastic, unforeseen and uncontrollable changes in the amounts of grapes available. In terms of actual utilization it is difficult precisely to classify any variety of grape except those which are suitable only for crushing into wine. Wine and table varieties each constitute about 20 per cent of production and raisin varieties account for about 60 per cent of production. Table grapes are utilized mainly for fresh table use and for wineries, with about equal division of the crop. There is violent fluctuation in the amount and in the percentage of the total production of raisin varieties going into raisin production and wineries. The tonnage crushed and the tonnage dried vary more from year to year than does total production either of all grapes or the separate varietal classes. If wine inventories are short, consumption brisk and prices rising, prices paid for heavy crushes have drawn sufficient table and raisin grapes into wineries to make it impossible to market the resulting wine production at prices covering the high cost of raw materials. Similarly a short raisin crop or good market outlook may draw more grapes than can profitably be sold to the trays and leave the wineries short. There are two facts with respect to prices and incomes which should be stressed. First, both price and incomes in all segments have been critically unstable as a result of variations in volumes going into the various channels. Second, the behavior of prices is precisely the same in all varietal classes and except for differential costs of entering various channels, the same in all utilizations. Thus no segment has been immune from instability.

The wine industry in the past several years has used more grapes than either of the other two outlets. Production has reached 160 million gallons in a single year. The crushing season is clearly defined with very early and very late tonnage representing mainly grapes residual to non-winery operations. Presently available data do not indicate that any grape characteristics now known could serve as effective bases for controlling the quality of wine or limiting the volume of the crush. (In general, all areas and all classes of wine enterprises have fairly well held their own in the years since repeal when wine production has expanded rapidly and continuously.) The dessert industry has grown fastest and now accounts for about four-fifths of output. Per capita consumption of table wines has not been greatly accelerated. There has been a steady increase in per capita consumption of dessert wines. The grape brandy industry is tied very closely to fortification of sweet wines. Wine prices rose fast and high to a peak in 1946. More than 1,600,000 tons were attracted to the wineries in that year. Within a few months dessert wine prices had broken as much as $1.00 per gallon and a drop of about 50 cents occurred in table wines when the size of the crush became known. In the next harvest season, the price of grapes to growers broke from more than $100 per ton to about $35 per ton and has sagged slightly in the two years since then. Following the peak prices and heavy crush of 1946, total returns to growers fell from more than $260 millions to about $100 millions in a single year and have since dropped to about $85 millions. These breaks affected all groups, since grapes will be diverted to the highest price outlets and the result of such diversion has been price equalization in all uses. The causes of such instability have not been eliminated. The loss in value of wine inventories in 1946 was staggering.

There are differences of opinion in the industries with respect to the need for controls or for industry organization, and also with respect to the proper distribution of its benefits and burdens. However, there is a complex and comprehensive pattern of programs arising from the long history of income depression or fluctuation in these industries. There are two advertising orders -- wine and raisins -- under state law designed to counteract the increasing long-run production by accelerating per capita consumption. Sale of wines may be controlled for eight months of the year. A stabilization fund has been collected to finance diversion from wineries if and as necessary. Provision now exists for mandatory price control in wines, and the resale price maintenance or loss leader laws may also be invoked on branded wines. Tokay grapes are controlled under a federal order. A federal raisin order regulates total commercial sales. This order is integrated with a federal purchase or diversion program in raisins running back fifteen years which has sought to benefit the entire grape industry through removal of as much as a half million tons of grapes from the market in a single year. The support of raisins is not mandatory under the law.

Thus the effects of increasing production, erratic changes and violent swings in utilization from one segment to another have been recognized by the industry. This pattern of programs is the result. The outlook for 1950 is basically good. Raisin surplus will probably have been largely eliminated under terms of the subsidy program. Wine inventories will be light, and apparent consumption increased sharply at the low prices prevailing in early 1949. The major danger lies in mal-distribution of the crop as between the various outlets. It is possible that high wine prices may lead to heavy crush and a light lay of raisins unless precautions against such utilization are taken. Wine is being held in order to register free inventory on June 30, 1950. The very light crush of 1949 and very high consumption at low 1949 prices have depleted inventories. The immediate danger in the industry appears to center around the wine market. Vintners may attract a very heavy crush, especially if raisin demand is low or the prospect of support is poor. High grape prices may draw heavy tonnage leading to a crush larger than can be sold at prices justifying the prices paid for grapes. Thus sequence has happened before. The way in which grapes are allocated in 1950 especially between wine and raisins, is the crucial factor in determining the level of grape prices in 1951.

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Economic Situation and Market Organization in the California Grape Industries

by

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Appendix A

Auxilliary Figures

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May, 1950

Contribution from the
Giannini Foundation of Agricultural Economics
Mimeographed Report No. 107

Fig. 1a. California Acreage of Major Wine Grape Varieties, 1936-1948

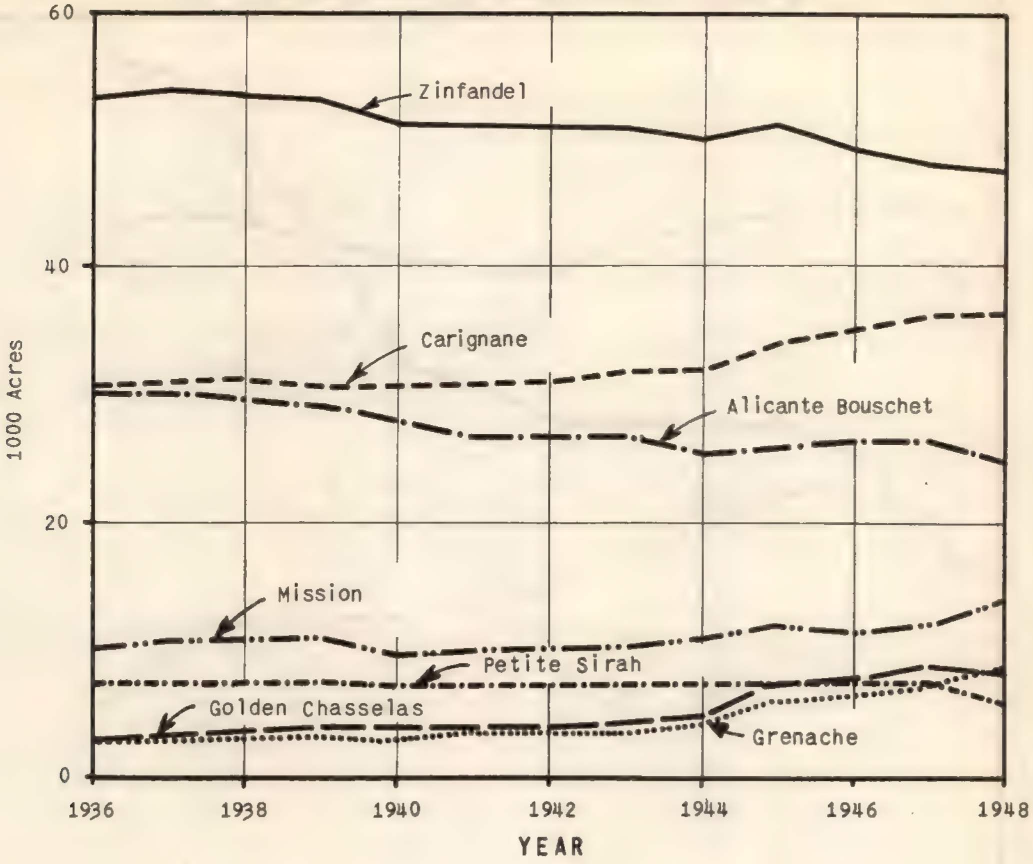


Fig. 2a. California Acreage of Major Table Grape Varieties, 1936-1948

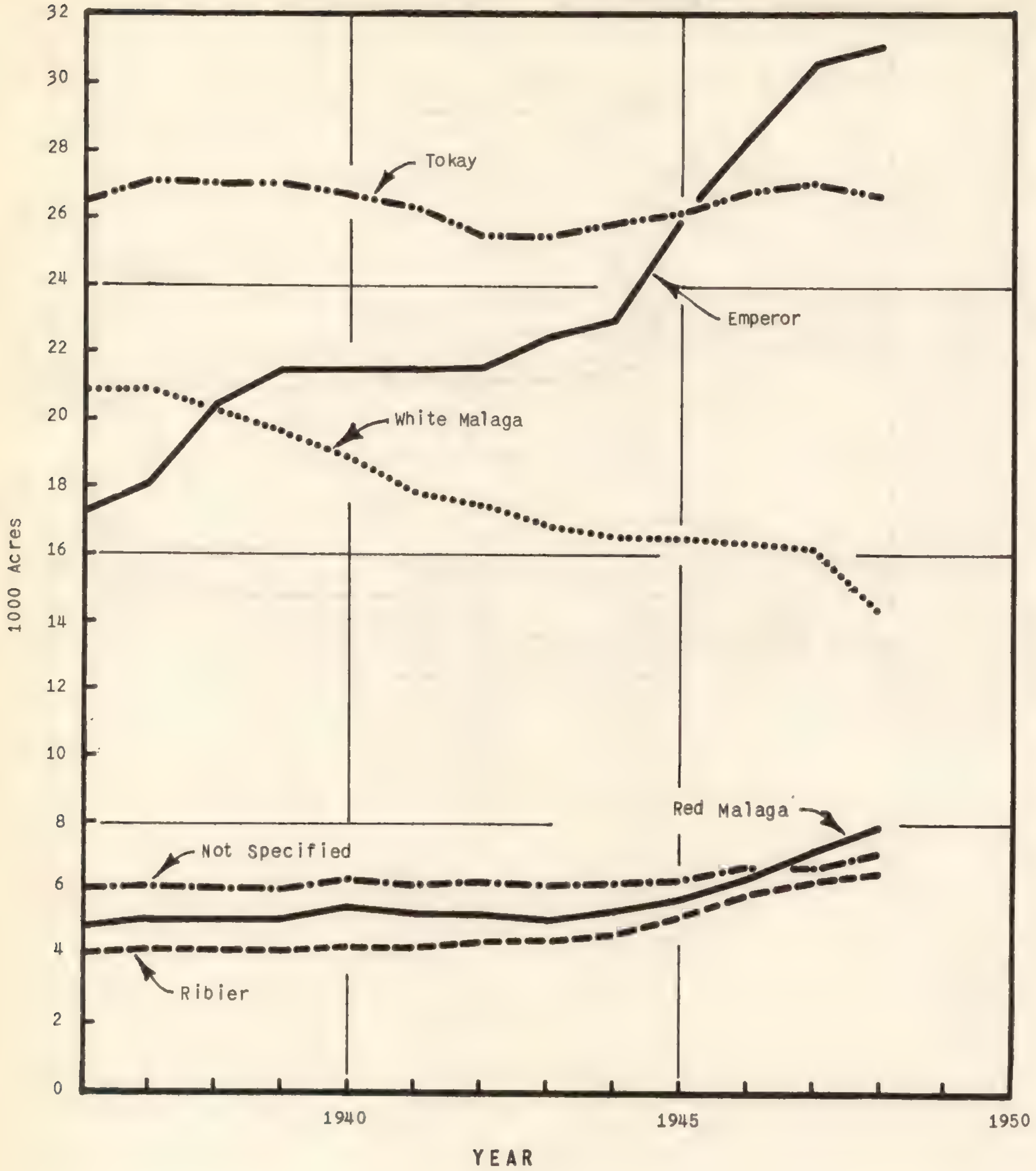


FIG. 3a. CALIFORNIA WINE GRAPE ACREAGE BY VARIETIES BY DISTRICTS, 1948

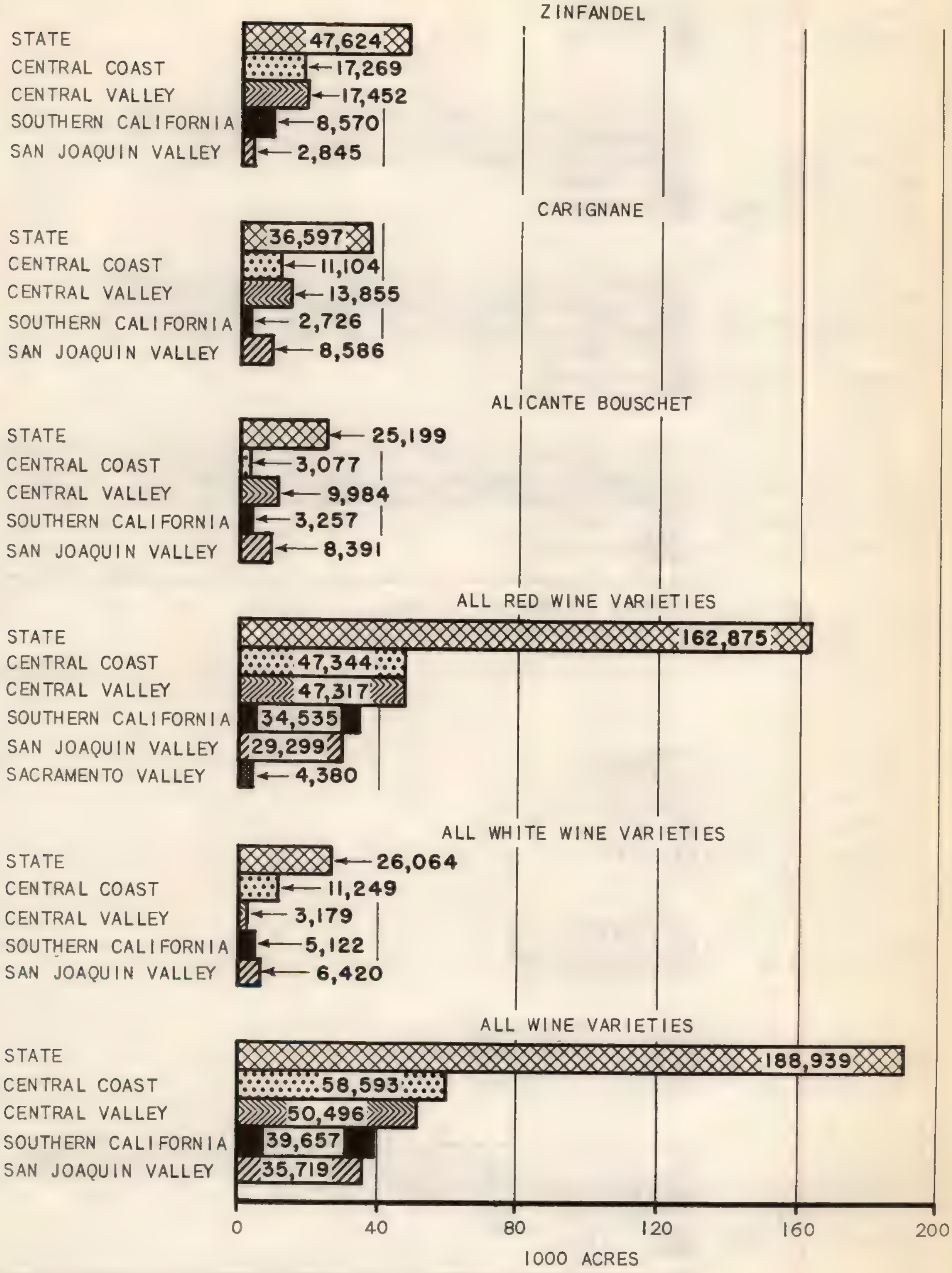


FIG. 4a. CALIFORNIA RAISIN GRAPE ACREAGE BY VARIETIES AND BY DISTRICTS, 1948.

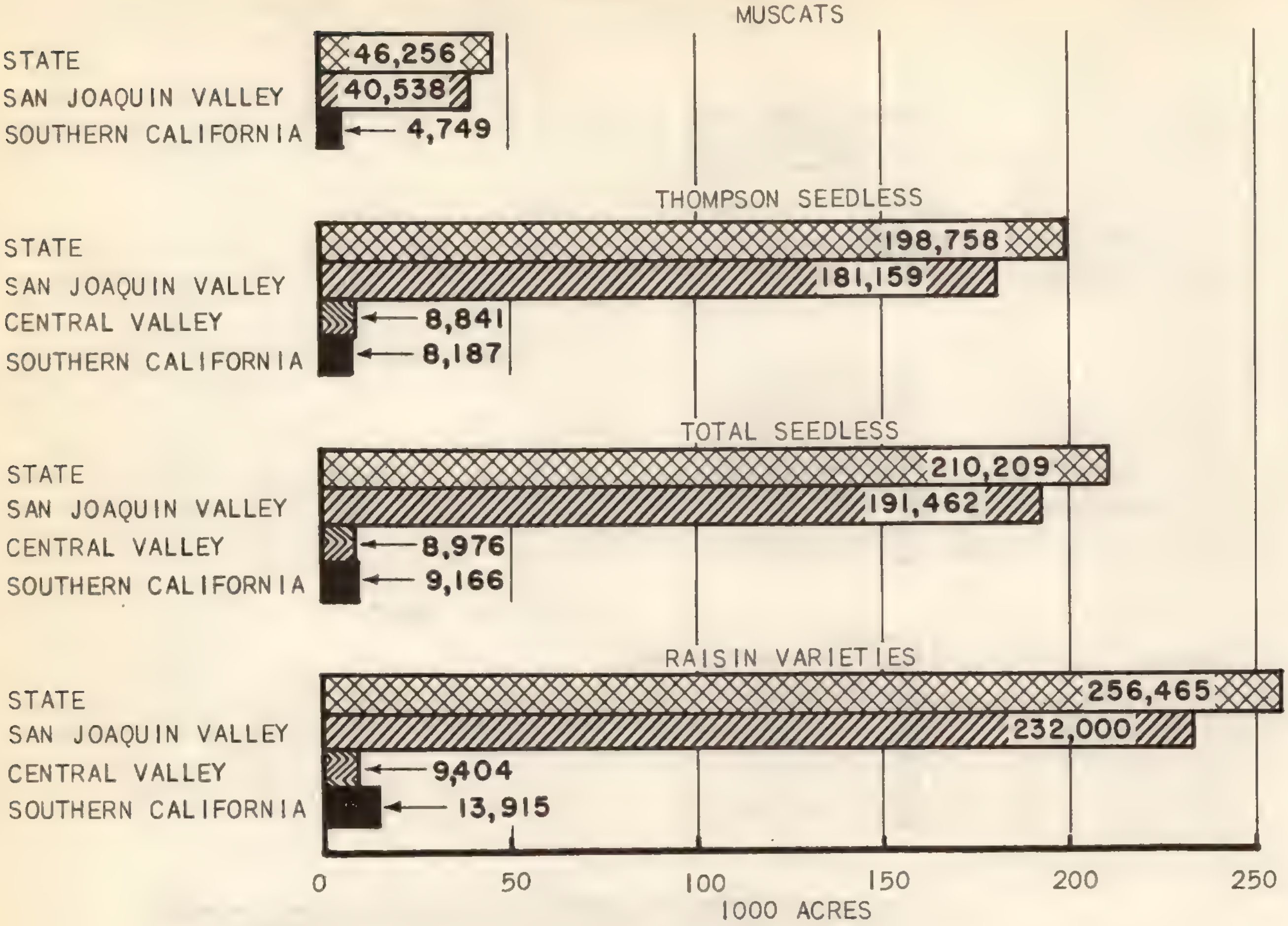


FIG. 5a. CALIFORNIA TABLE GRAPE ACREAGE BY VARIETIES AND BY DISTRICTS, 1948

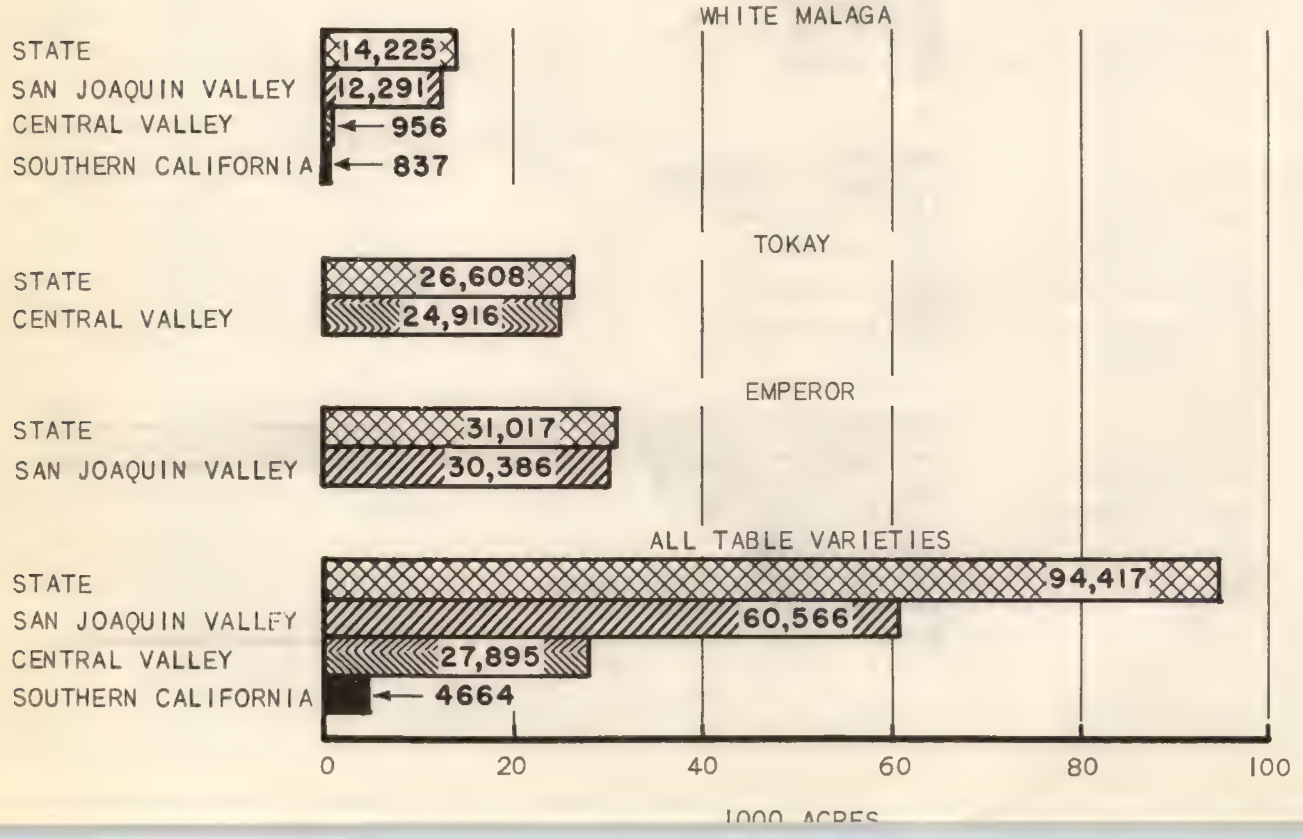


Fig. 6a. Bearing Acreage of Grapes in the Central Coast District by Varietal Classes, 1923 - 1948

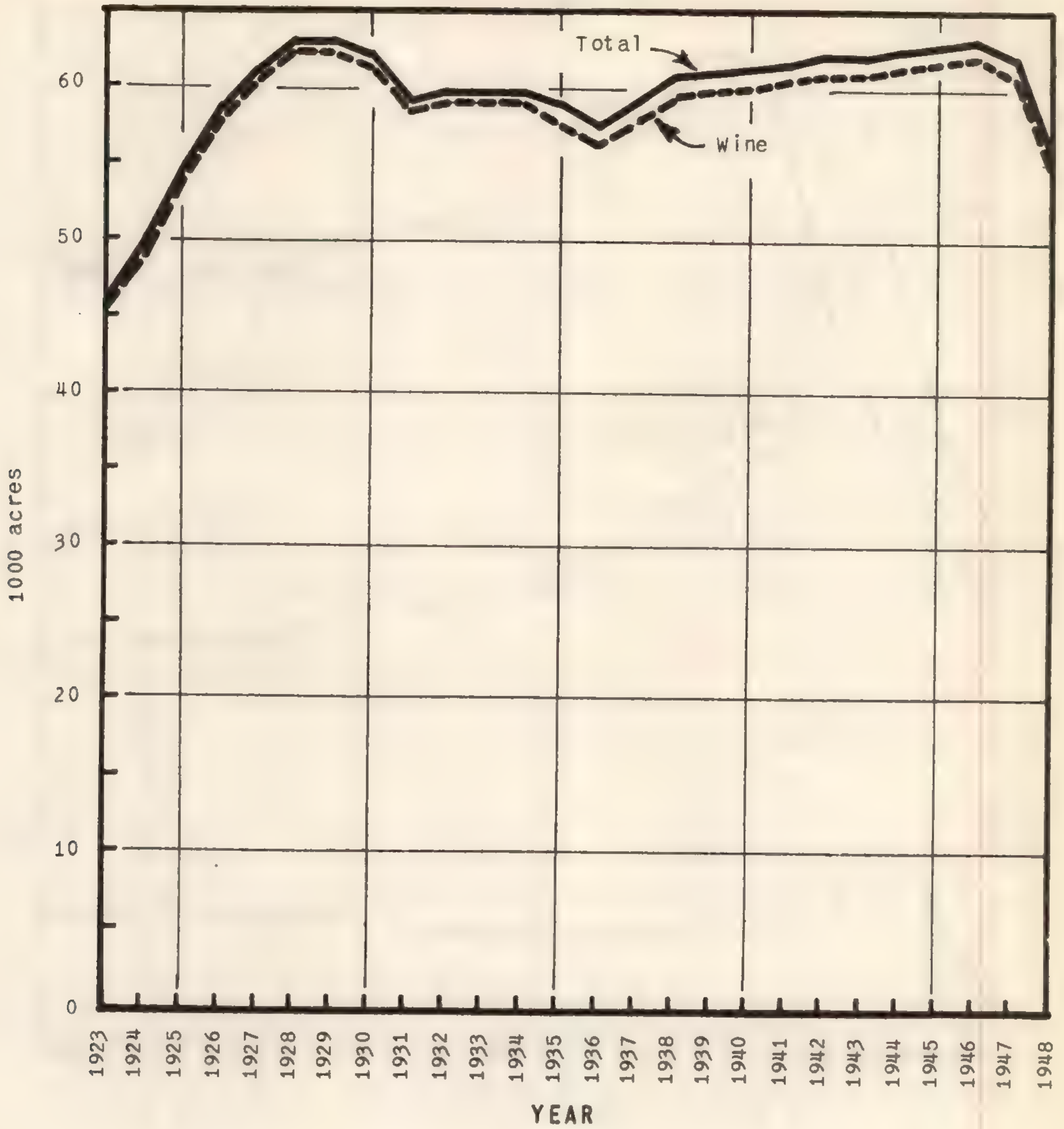


Fig. 7a. Bearing Acreage of Grapes in the Central Valley District by Varietal Classes, 1923-1948

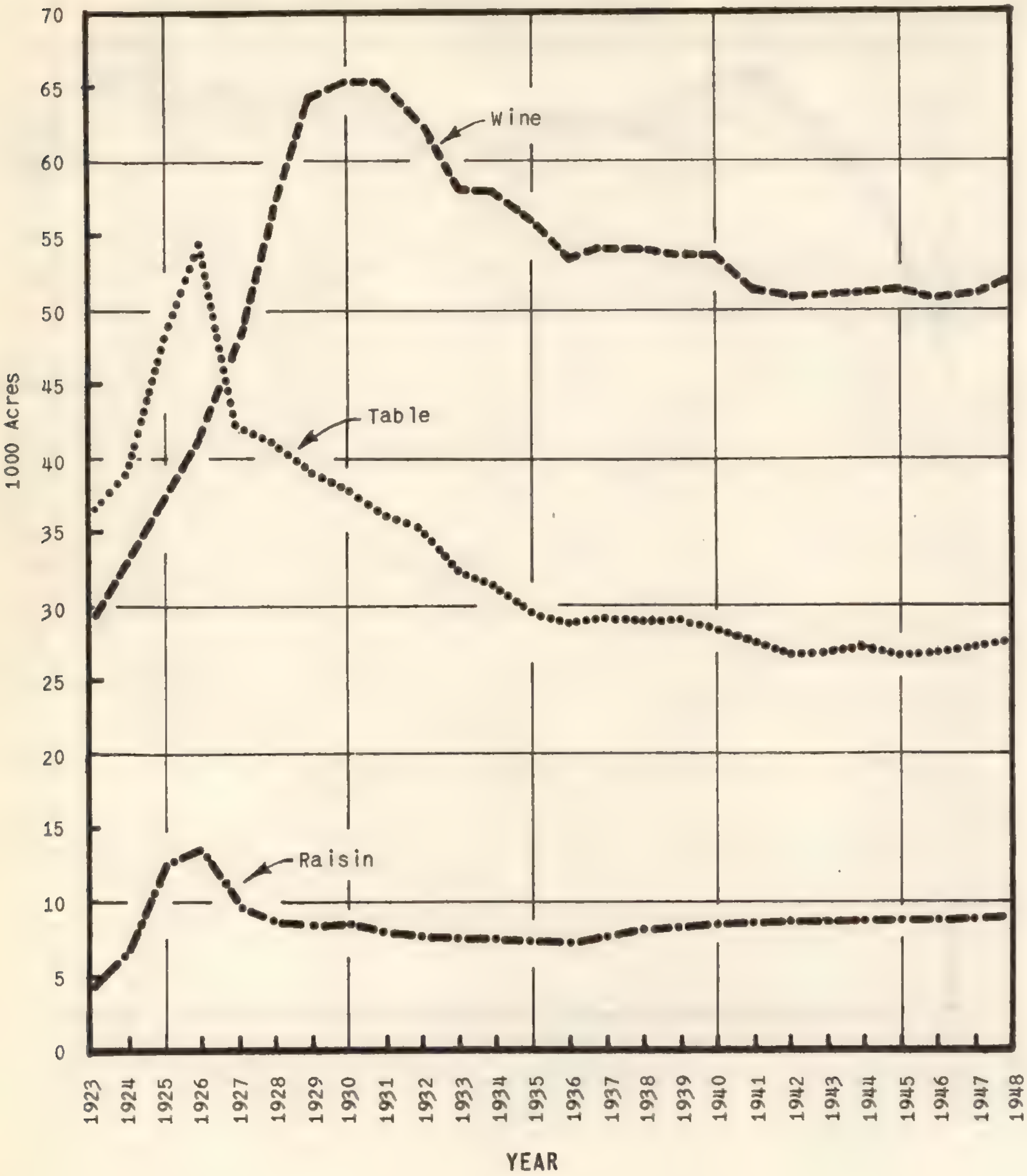


Fig. 8a. Bearing Acreage of Grapes in the Southern California District by Varietal Classes, 1923-1948

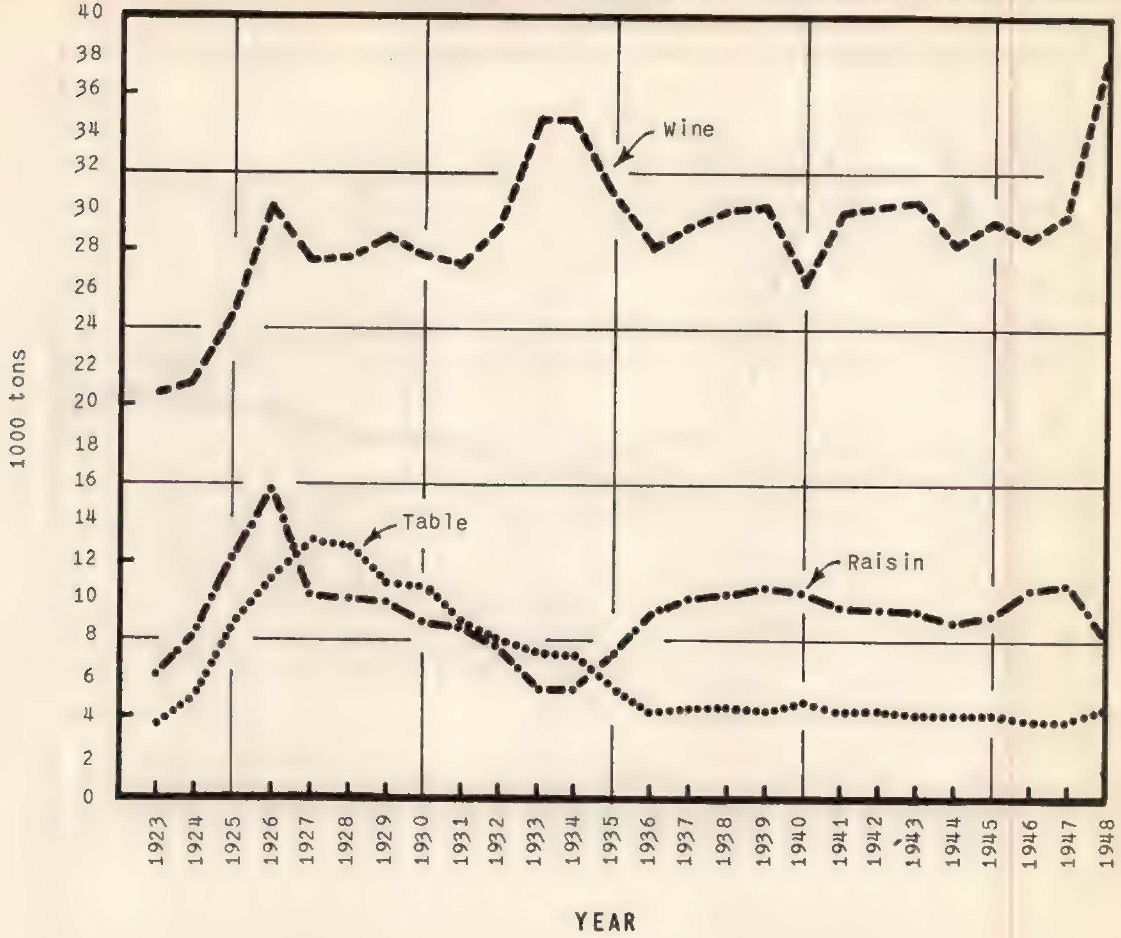


Fig. 9a. Bearing Acreage of Grapes in the San Joaquin Valley District by Varietal Classes, 1923 - 1948

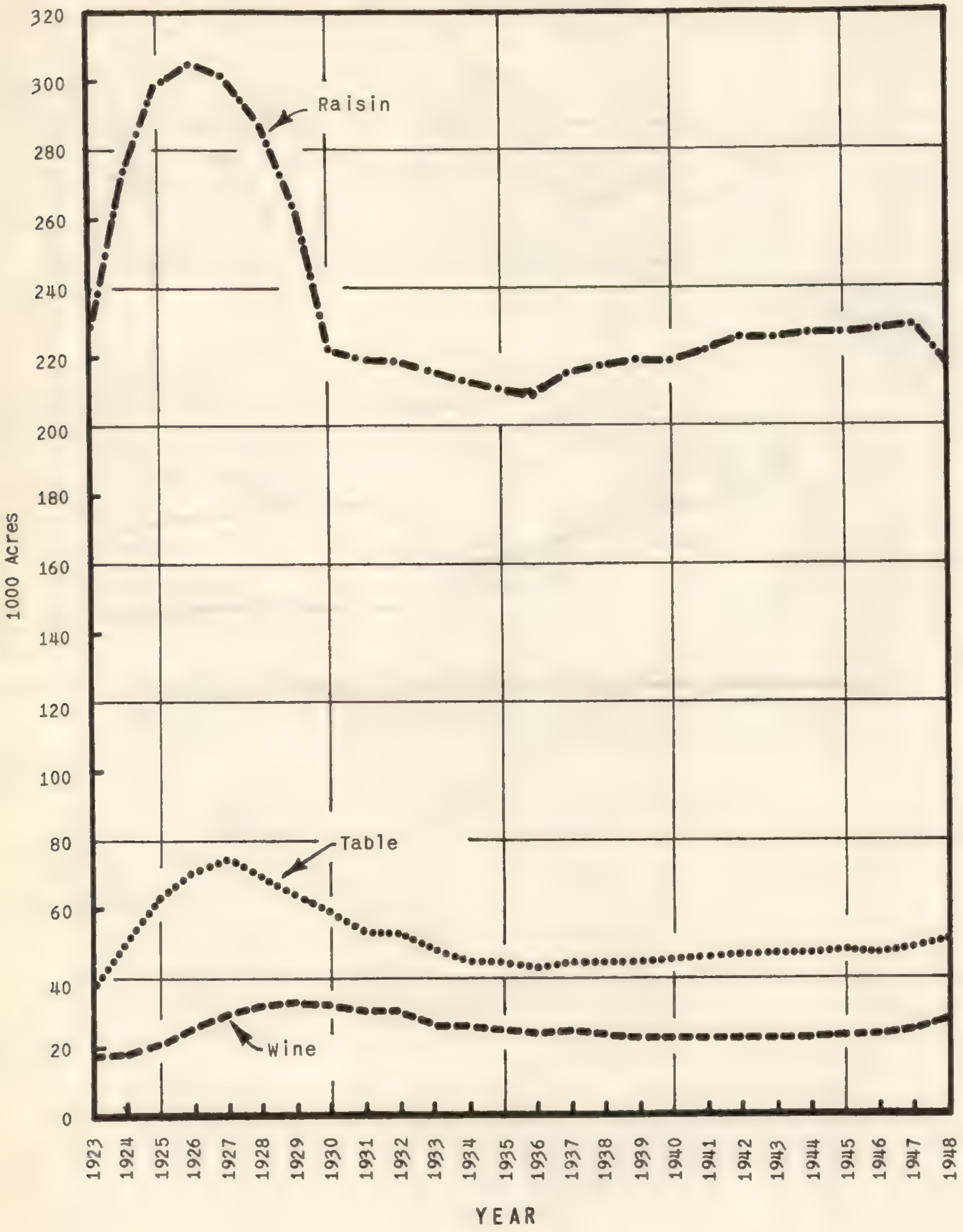


Fig. 10a. Bearing Acreage of Grapes in the Sacramento Valley District by Varietal Classes, 1923-1948

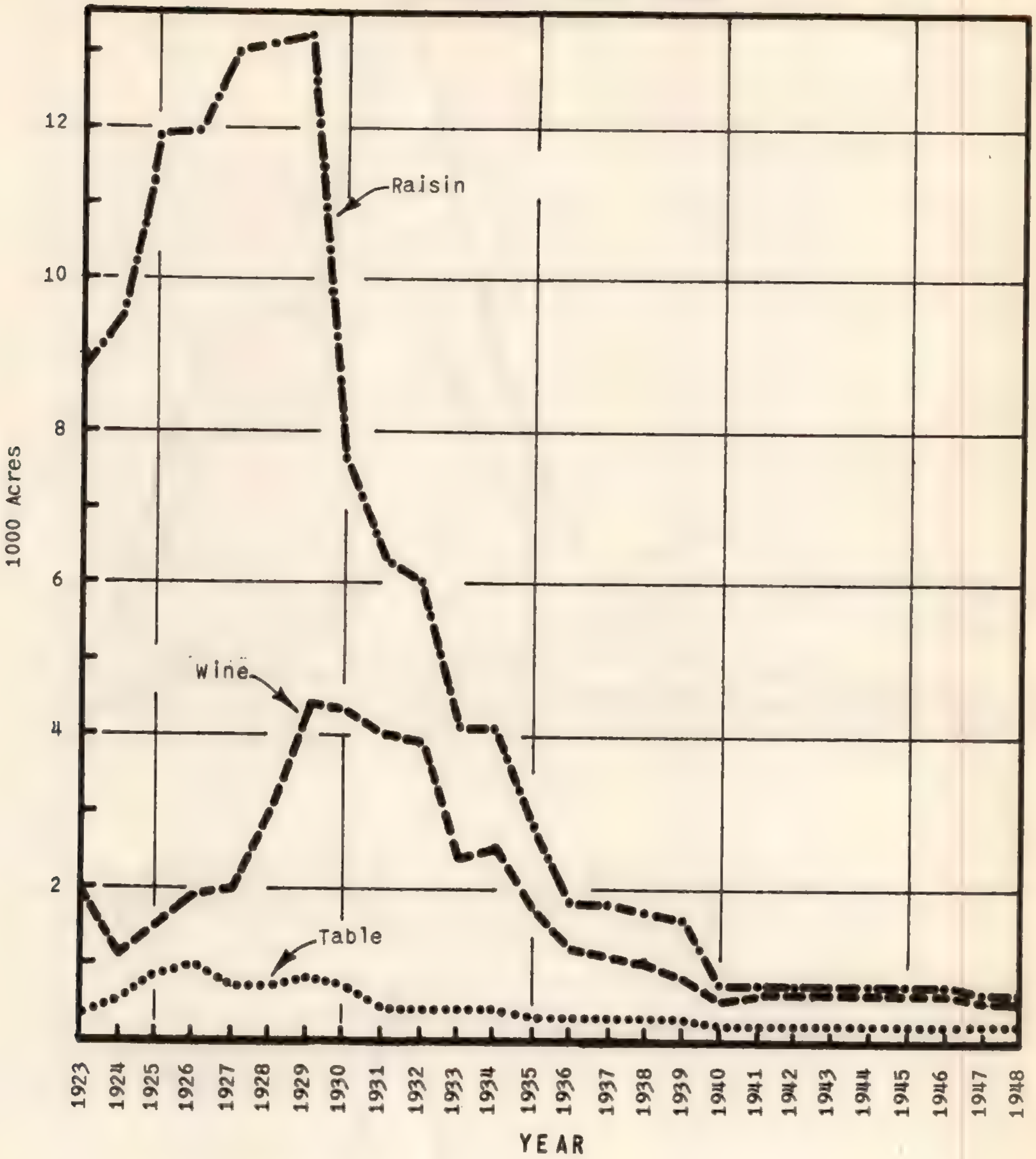


Fig. 11a. California Acreage of Major Varieties of Red Wine Grapes by Year Planted 1938-1948 and Standing in 1948

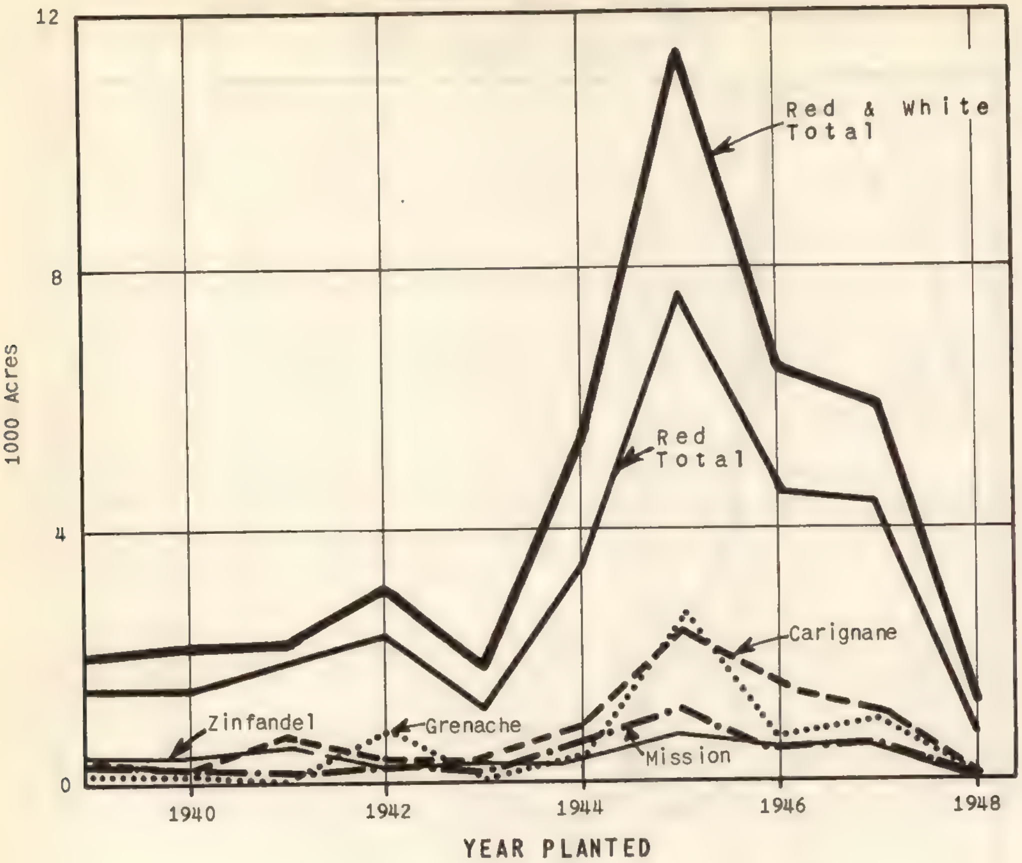


Fig. 12a. California Acreage of Major Varieties of White Wine Grapes by Year Planted 1938-1948 and Standing in 1948

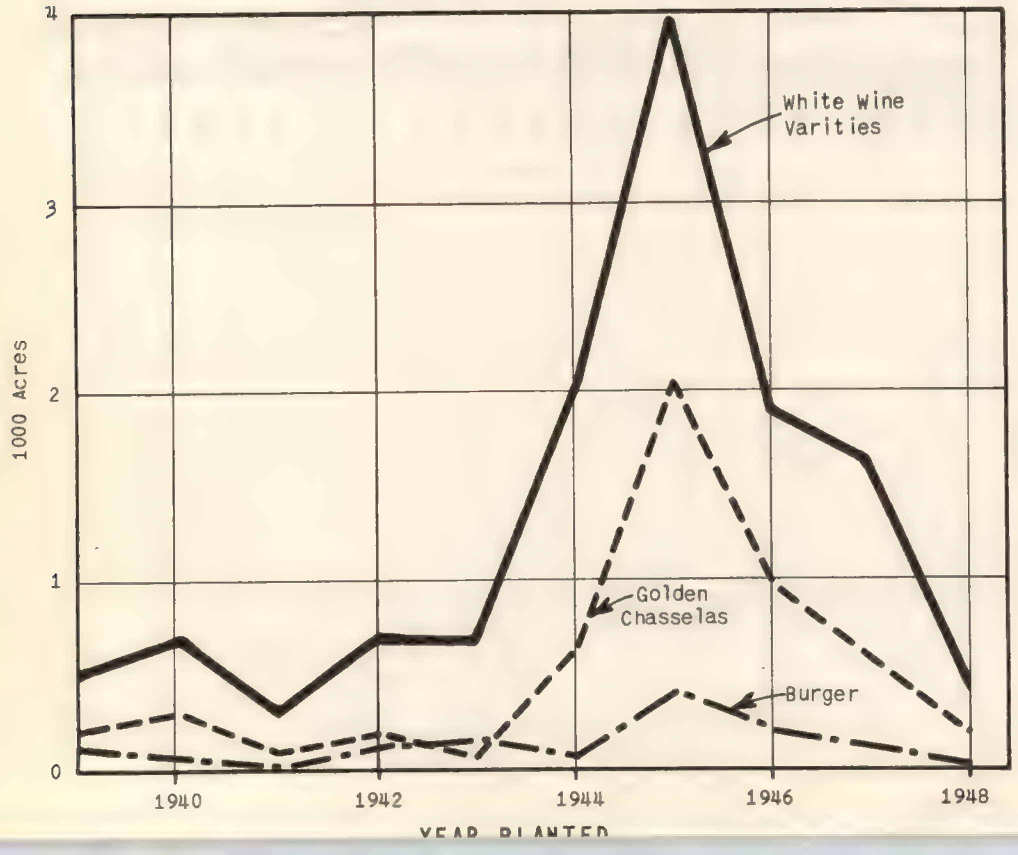


Fig. 13a. California Acreage of Major Varieties of Raisin Grapes by Year Planted 1938-1948 and Standing in 1948

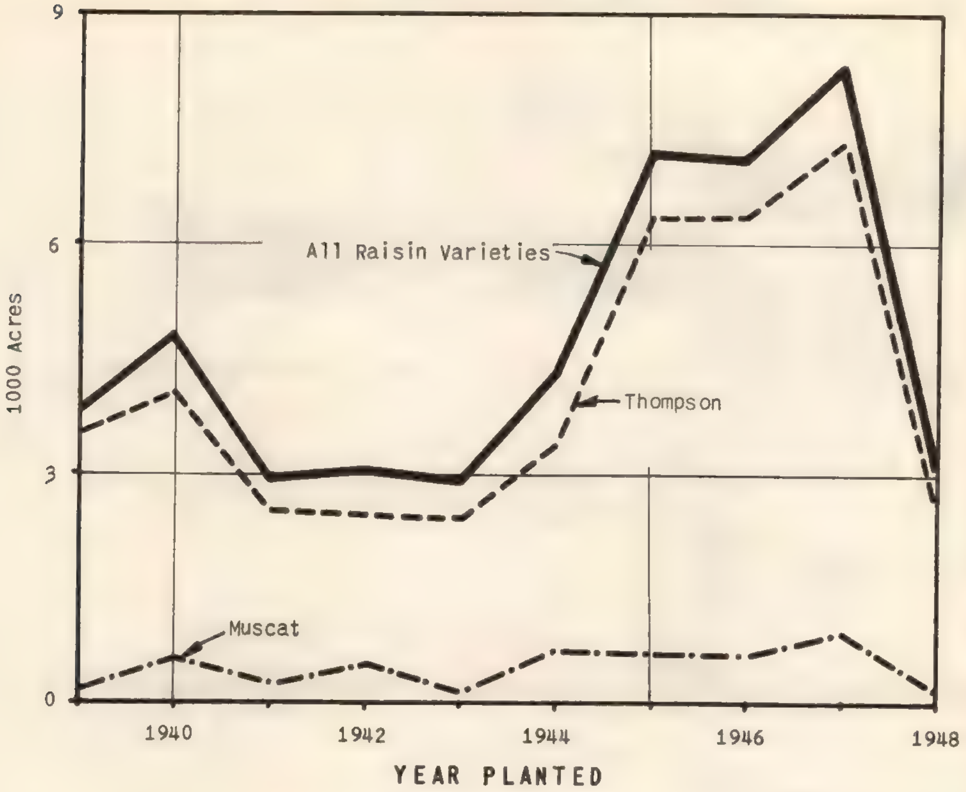


Fig. 14a. California Acreage of Major Varieties of Table Grapes by Year Planted 1938-1948 Standing in 1948

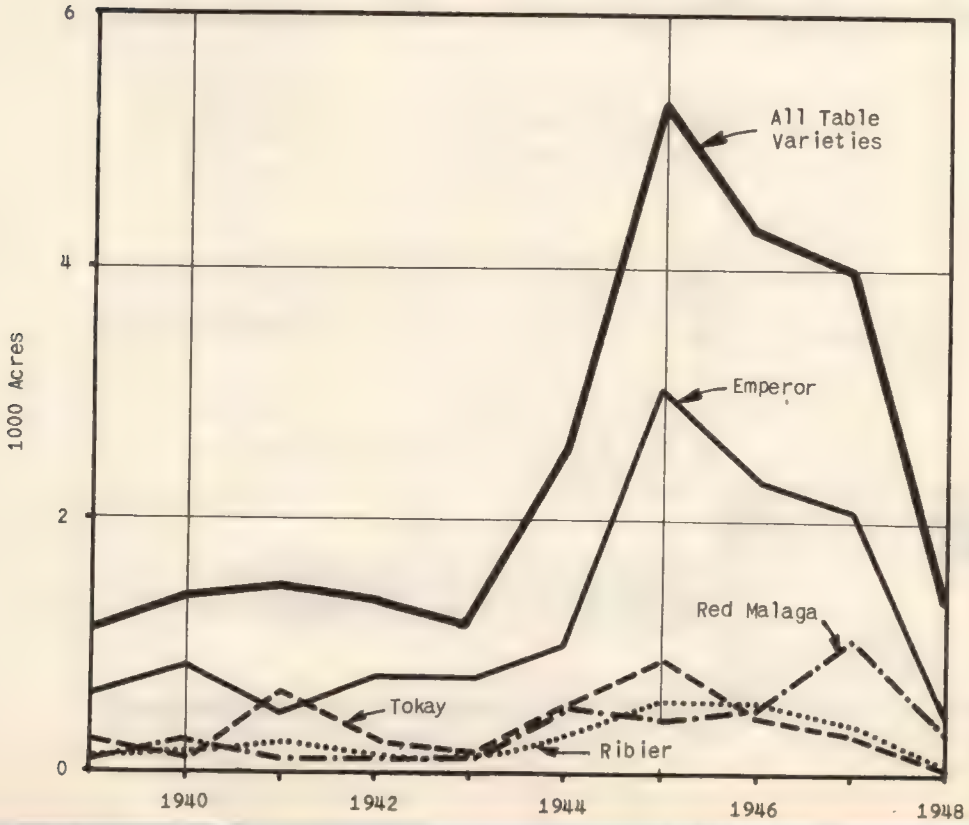


FIG. 15a. ACREAGE CHANGES OF CALIFORNIA RAISIN GRAPES IN ACRES AND AS PERCENT OF 1936 ACREAGE BY VARIETIES AND MAJOR DISTRICTS, 1936-1948

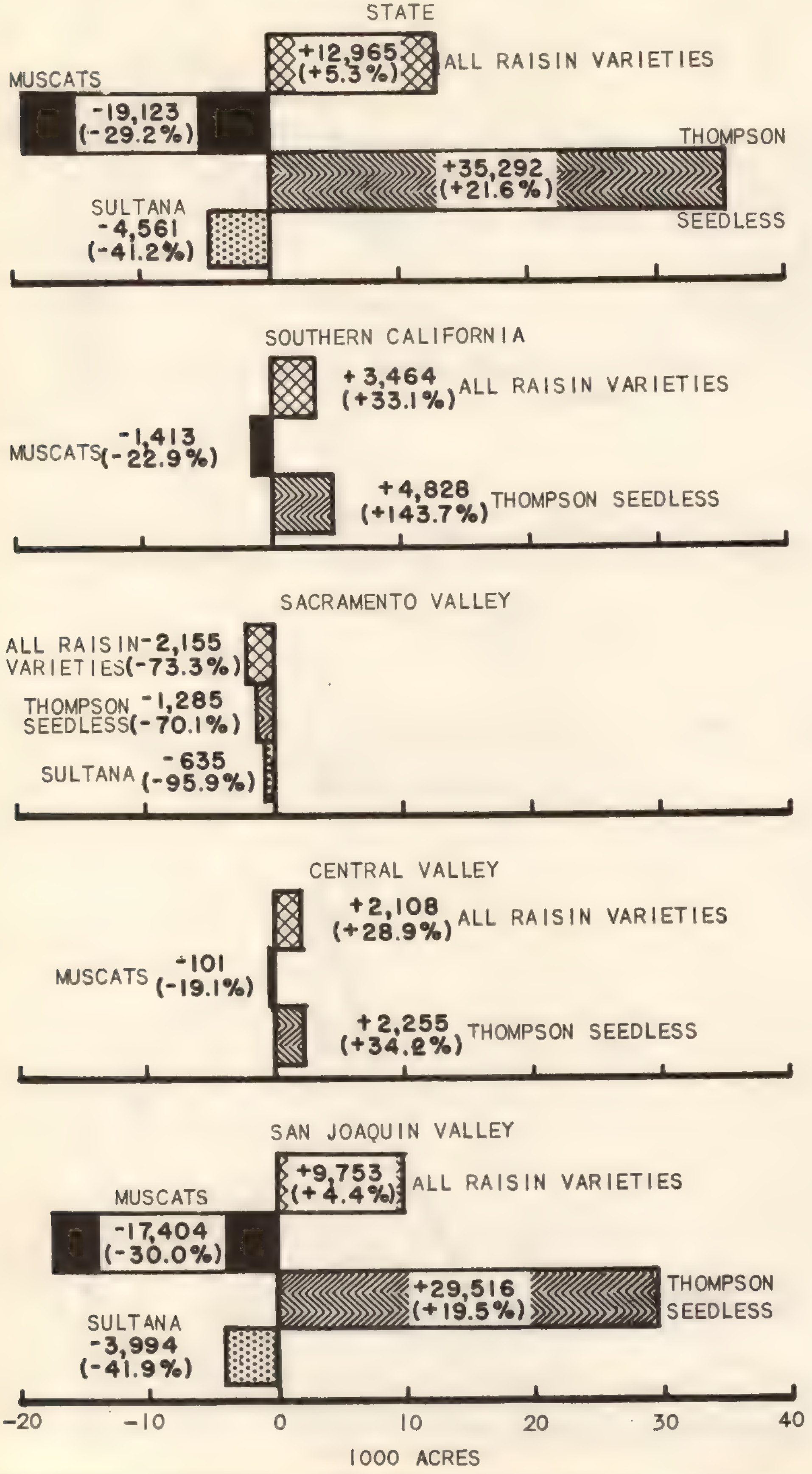


Fig. 16a. California Wine Grapes: Percent of Full Crop by Districts as of October 1, 1930-1949

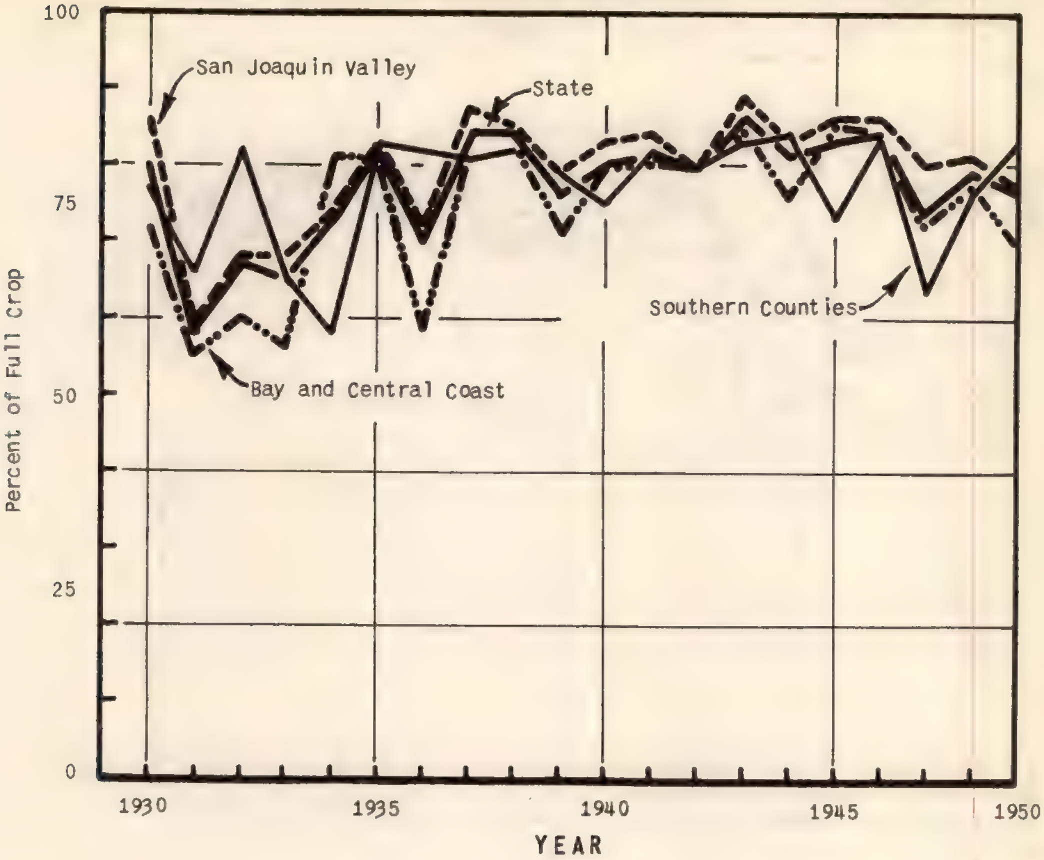


Fig. 17a. California Raisin Grapes: Percent of Full Crop by Districts as of October 1, 1930-1949

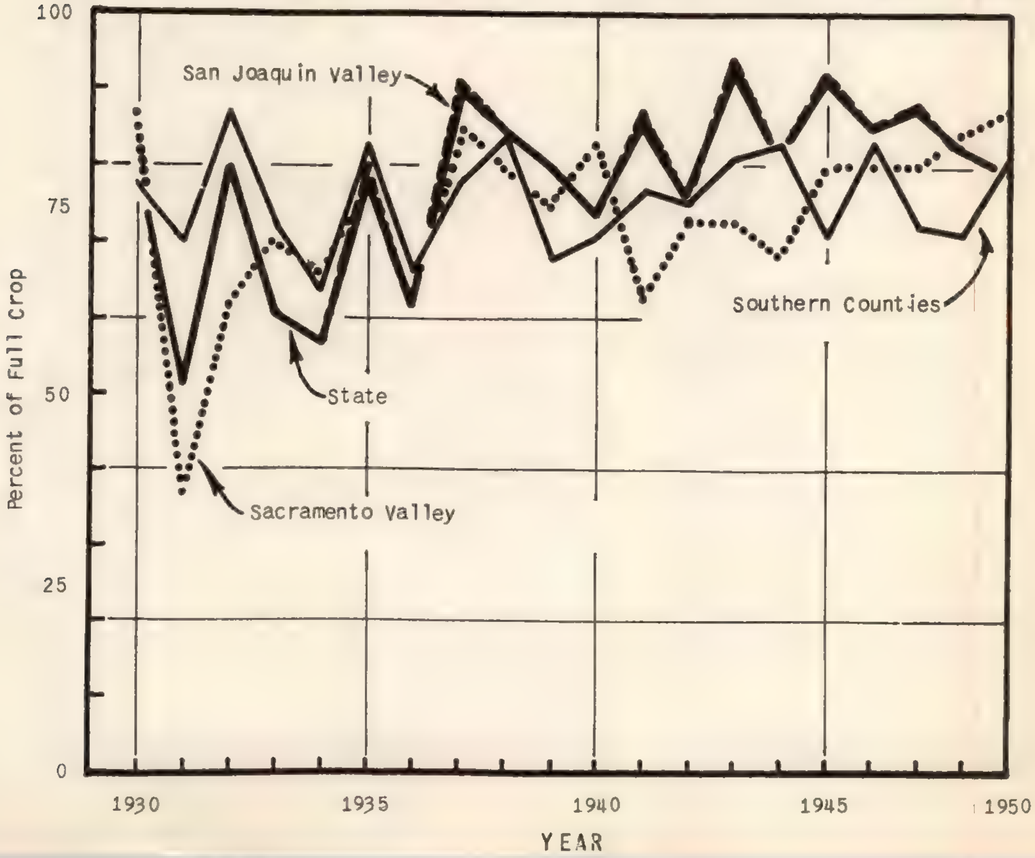


Fig. 18a. California Table Grapes: Percent of Full Crop by Districts as of October 1, 1930 - 1949

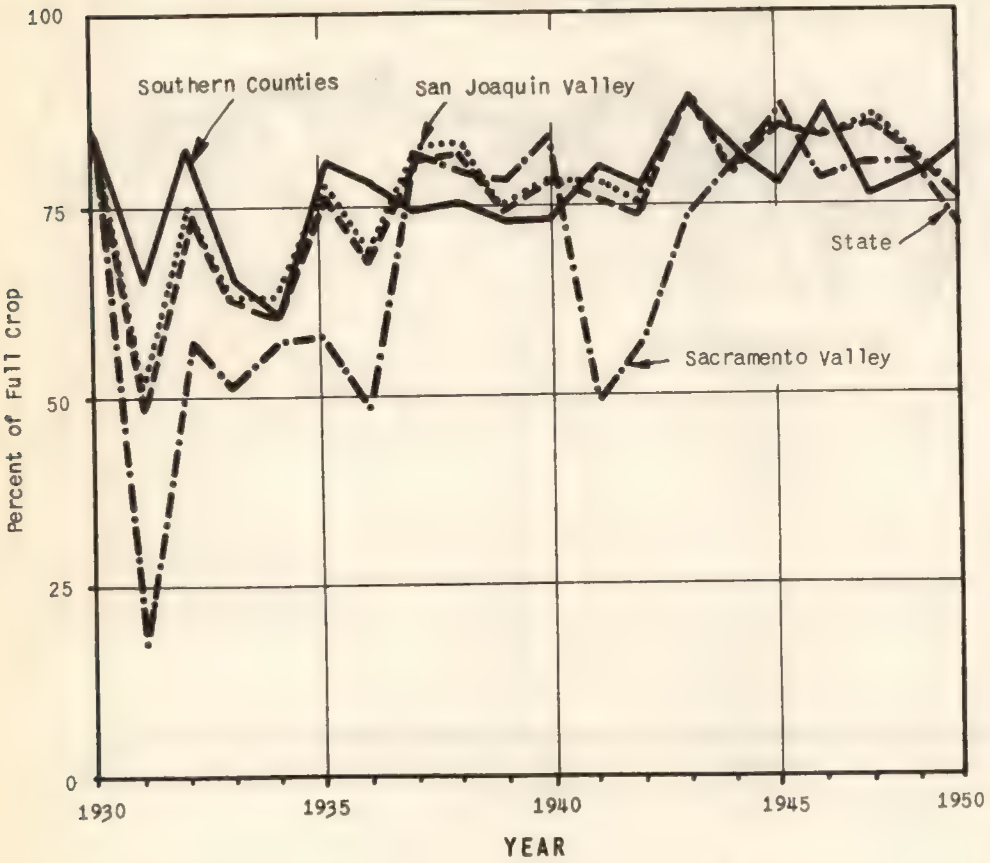


Fig. 19a. Utilization of all Varieties of California Grapes: Percent of Harvested Production, 1927-1949

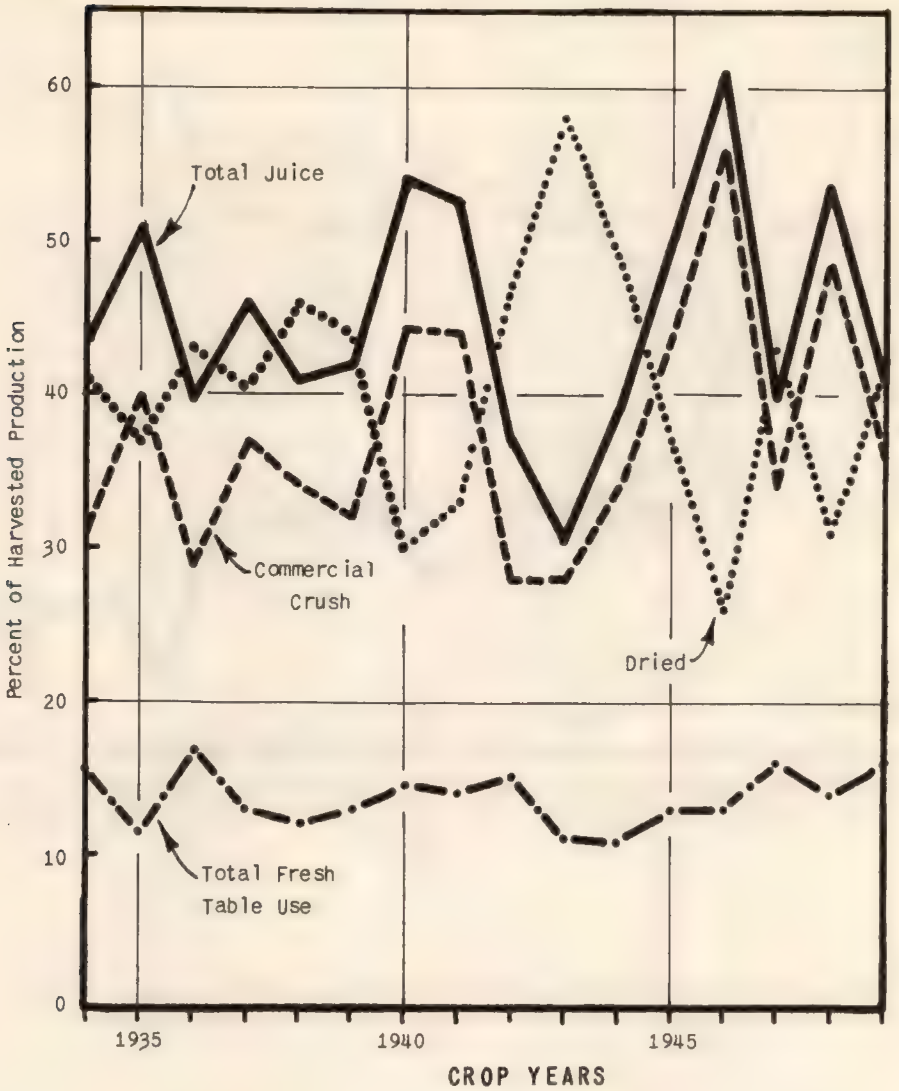


Fig. 20a. Utilization of California Wine Grape Varieties as Percent of Harvested Production, 1927-1949

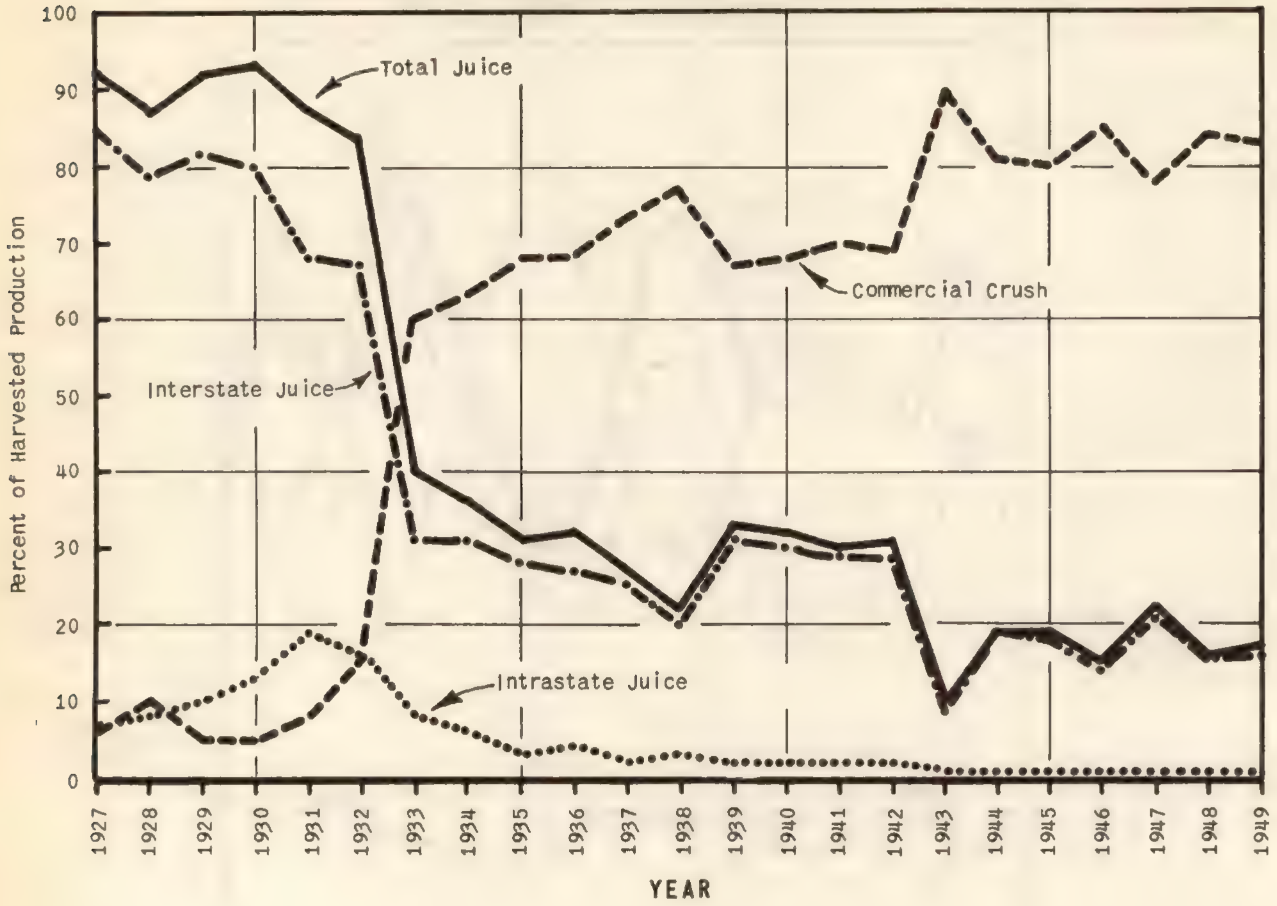


Fig. 21a. Utilization of California Raisin Grape Varieties as Percent of Harvested Production, 1934-1949

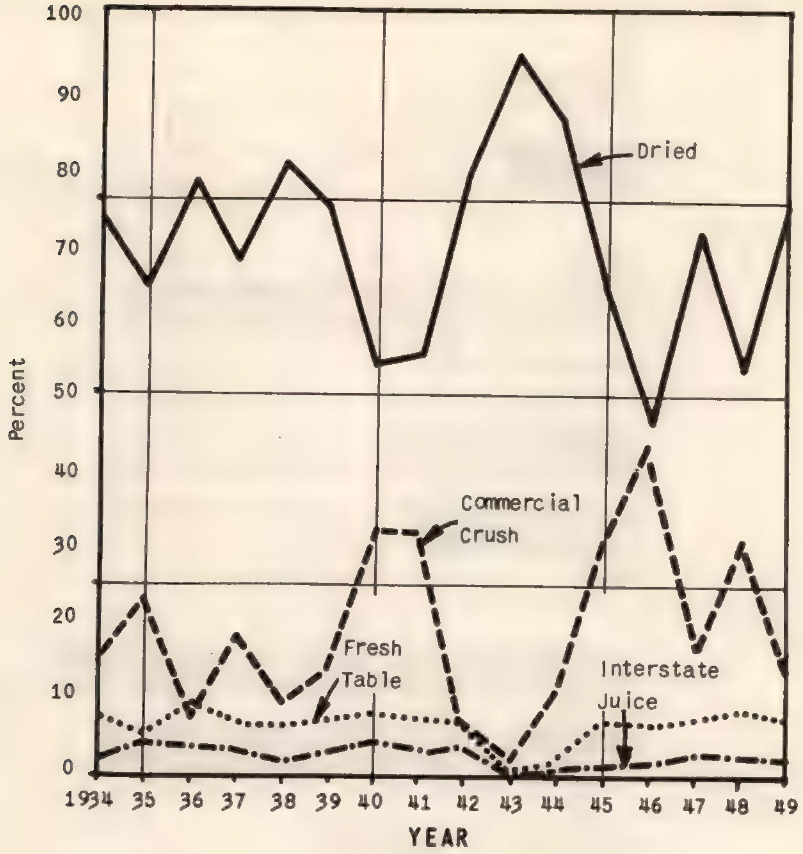


FIG. 22a. AVERAGE ANNUAL UTILIZATION OF MUSCATS, THOMPSONS, TOKAY, EMPEROR AND OTHER TABLE GRAPES, 1945 - 1948

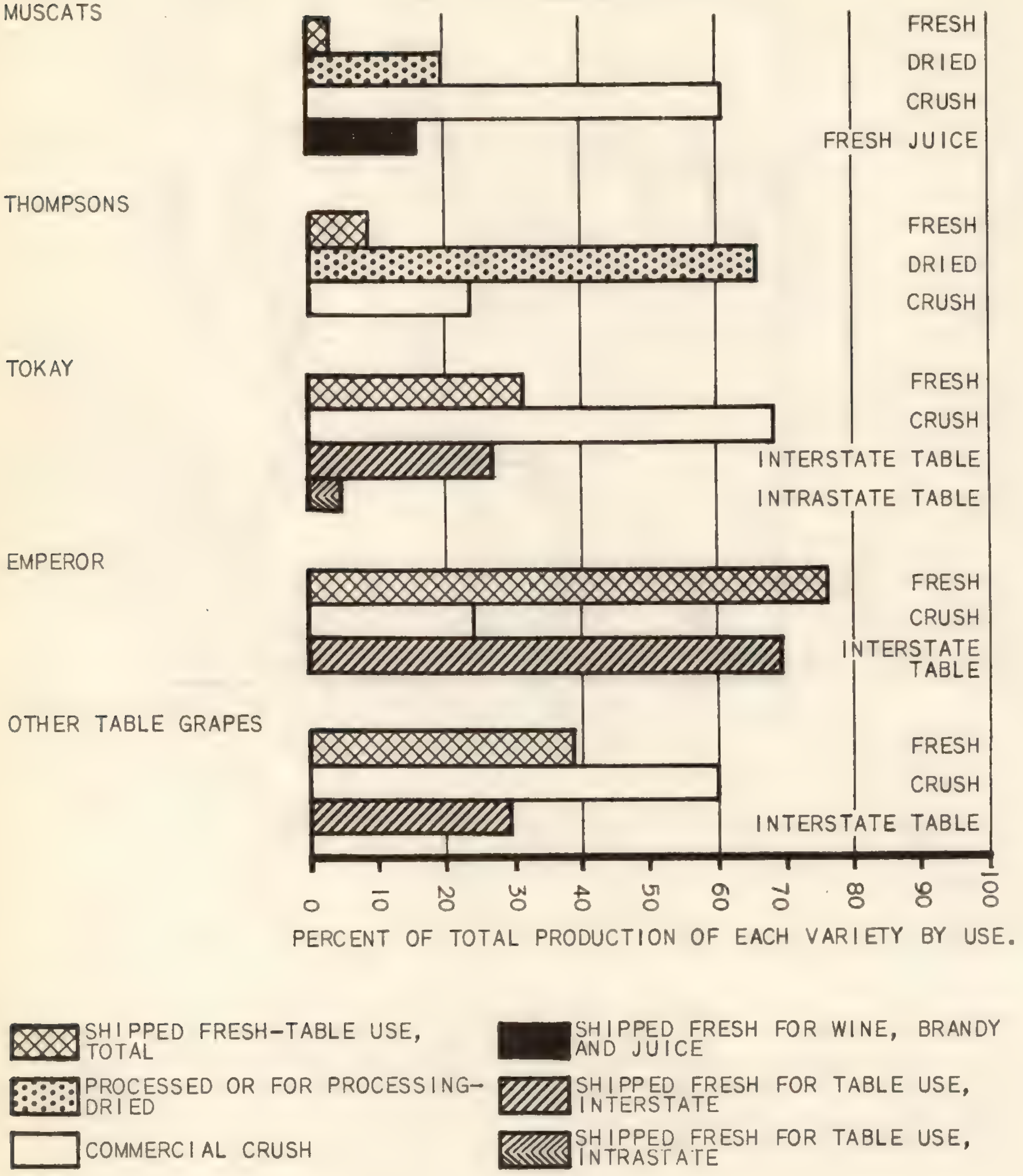


Fig. 23a. Utilization of California Table Grape Varieties as Percent of Harvested Production, 1927-1949

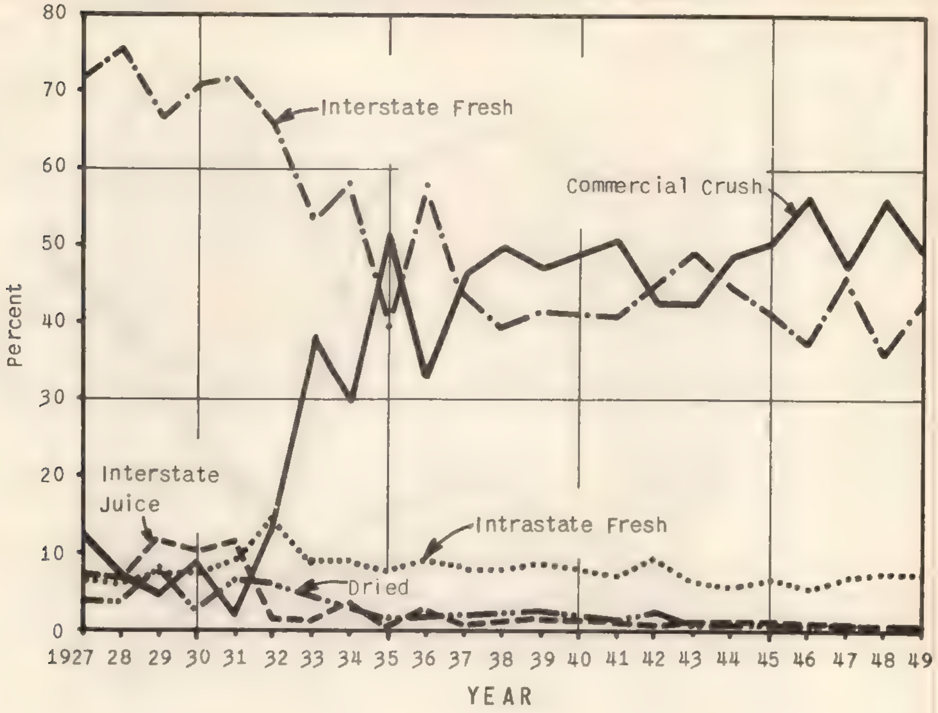


Fig. 24a. Distribution of Fresh Grapes for Table Fruit, 1934 - 1948

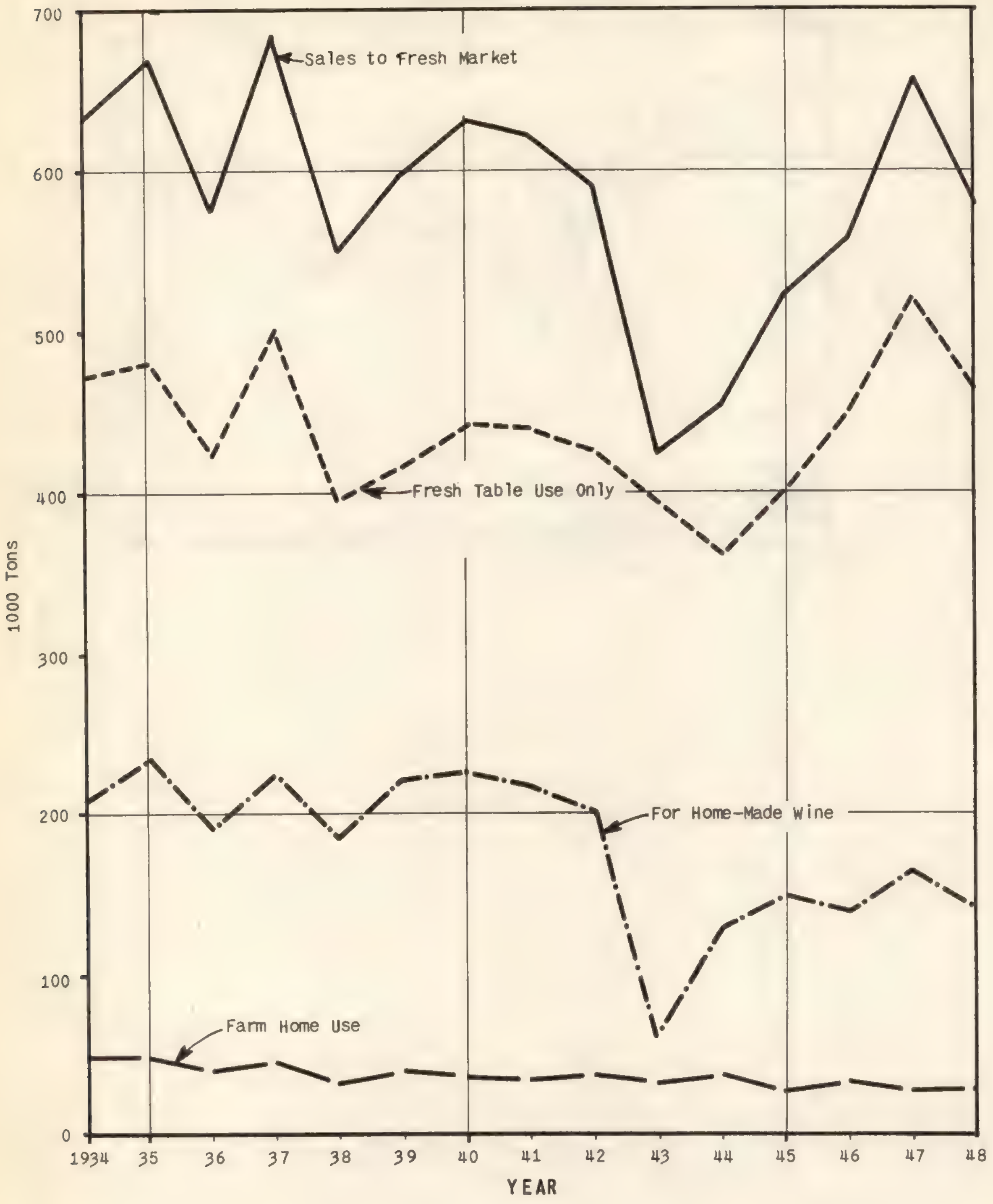


Fig. 25a. Average Sugar-Readings by Variety and Date of Delivery, Dinuba, 1947

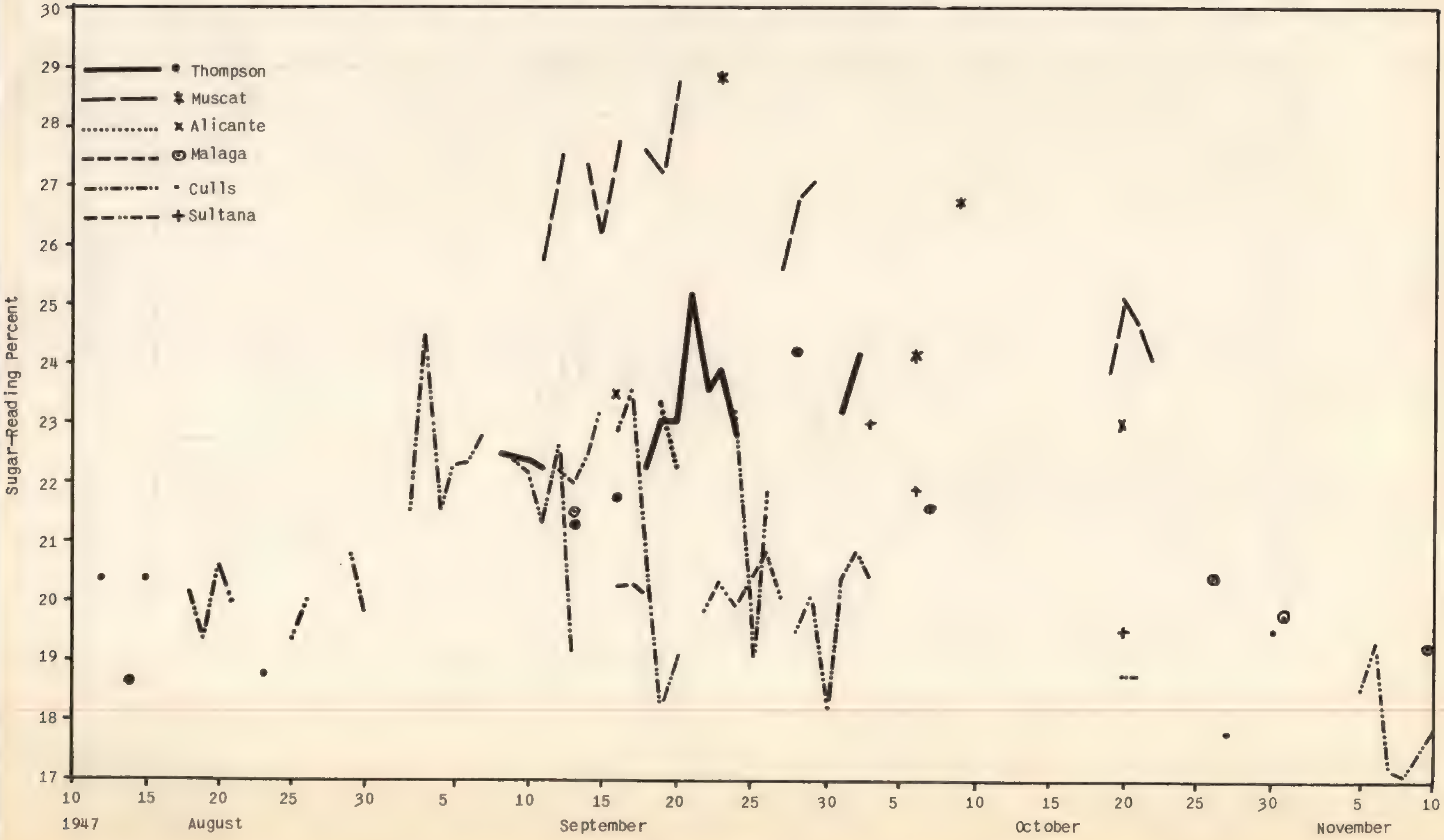


Fig. 26a. Average Sugar-Readings by Variety and Date of Delivery, Livingston, 1947

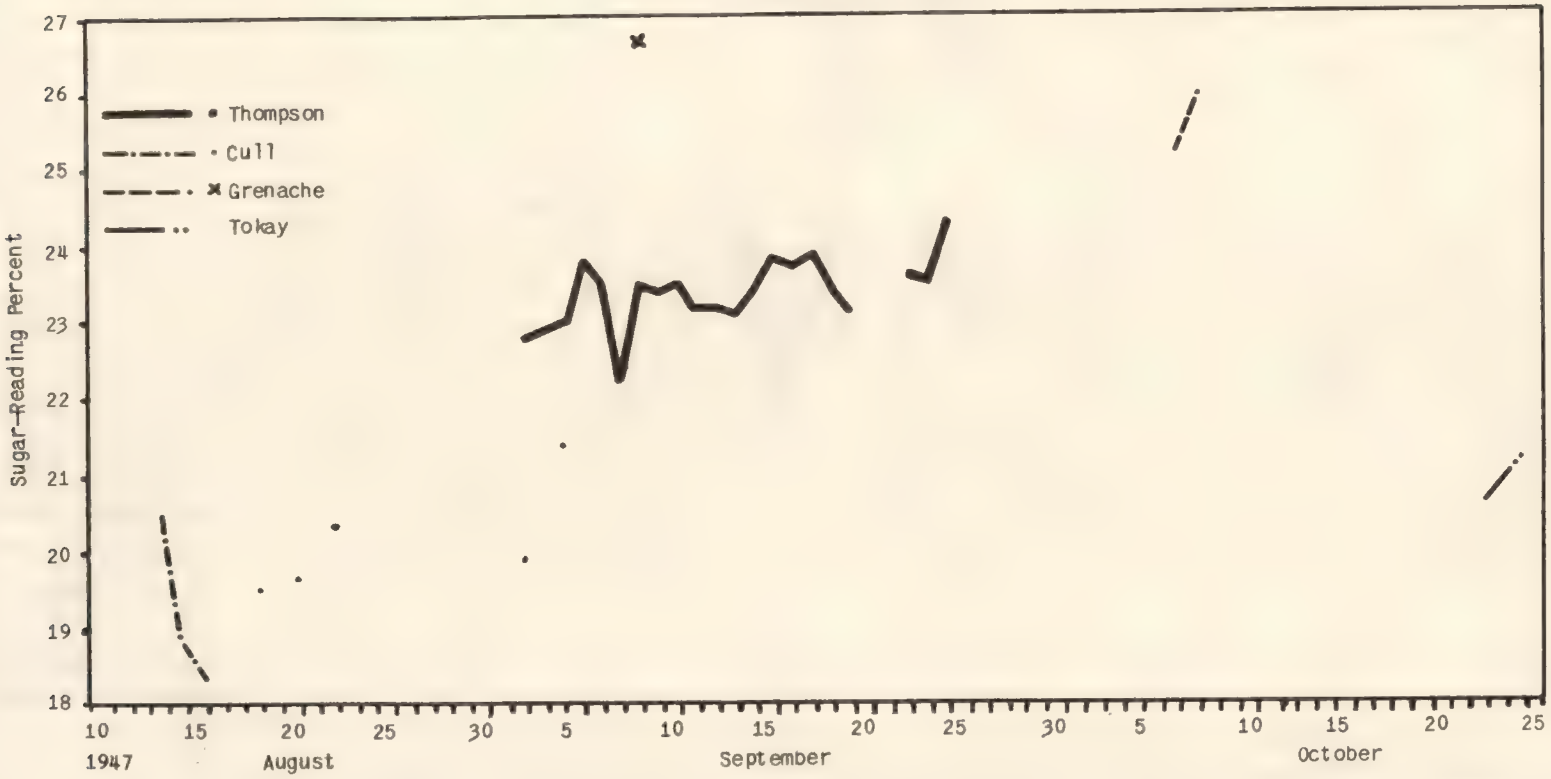


Fig. 27a. Average Sugar-Readings by Variety and Date of Delivery, Kingsburg, 1947

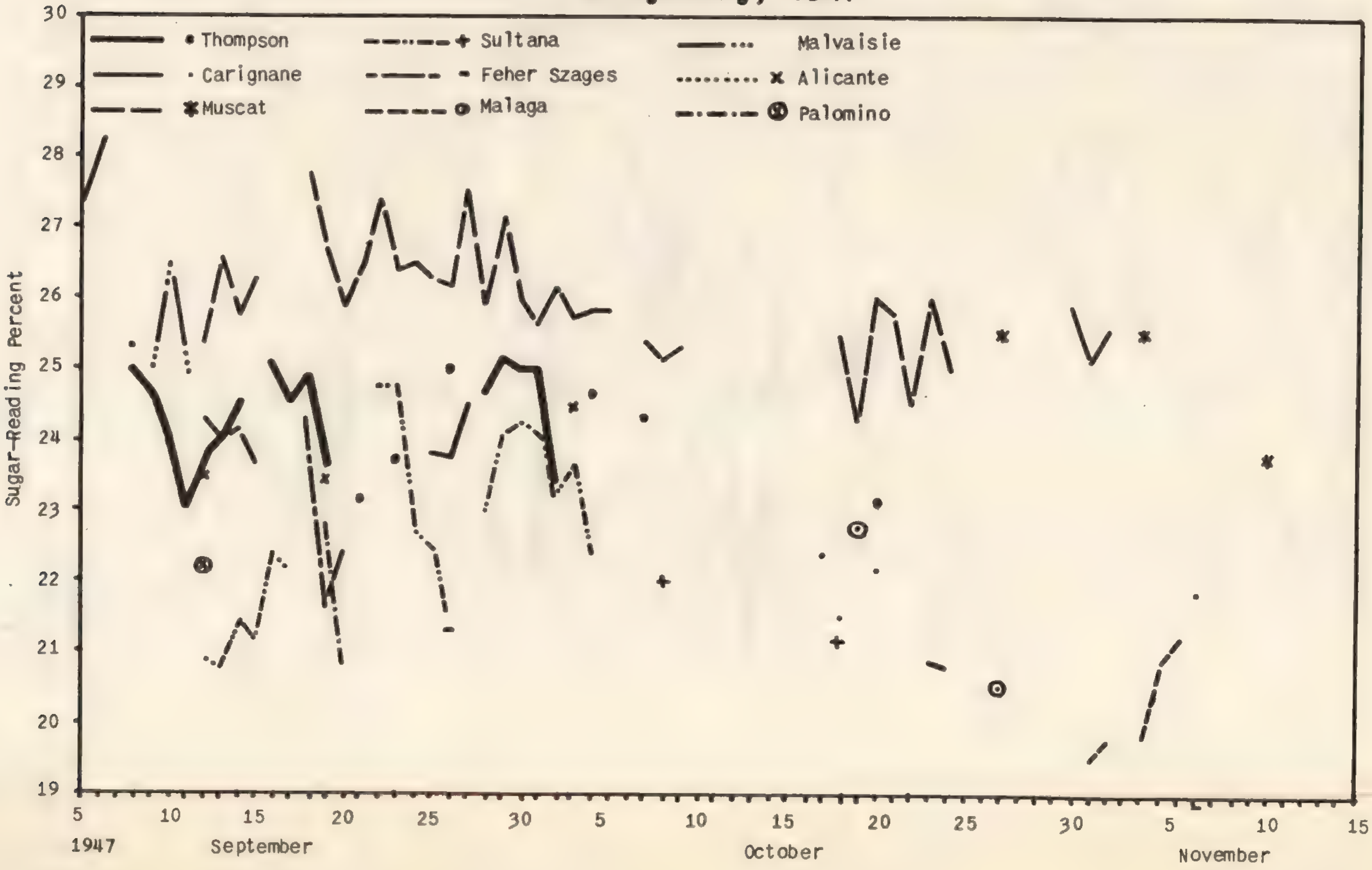


Fig. 28a. Average Sugar-Readings by Variety and Date of Delivery, Sanger, 1947

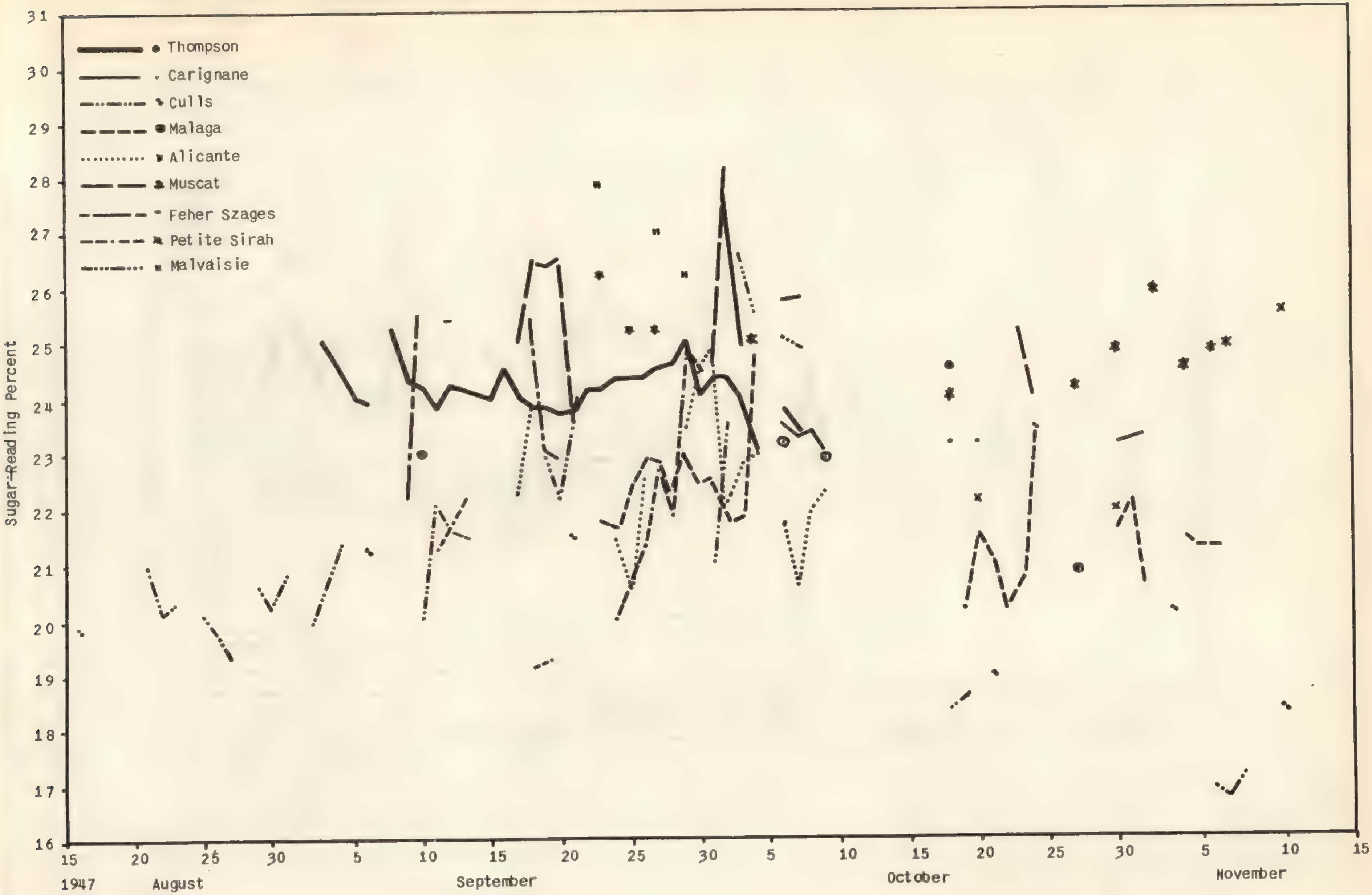
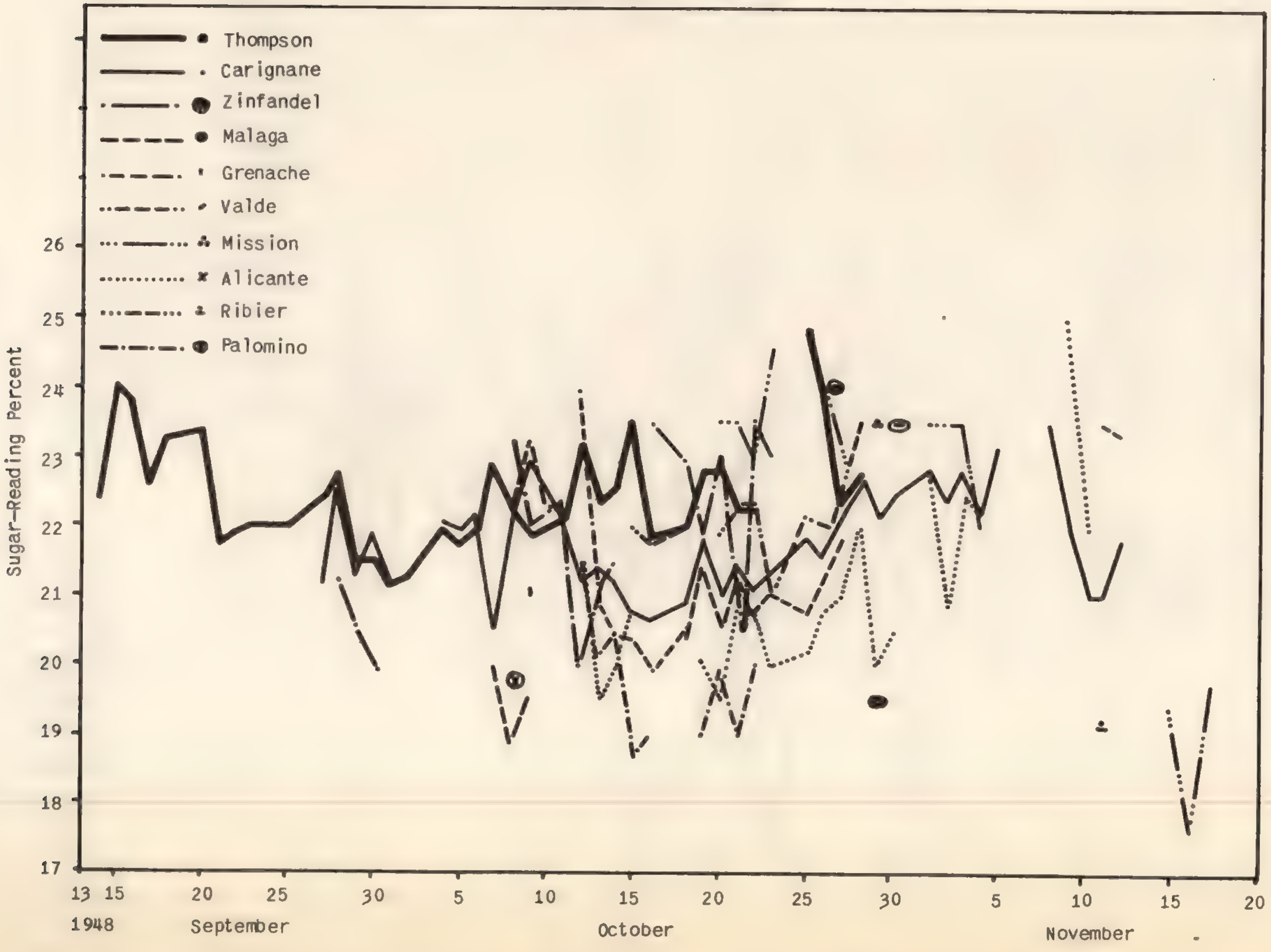


Fig. 29a. Average Sugar-Readings by Variety and Date of Delivery, Modesto, 1948



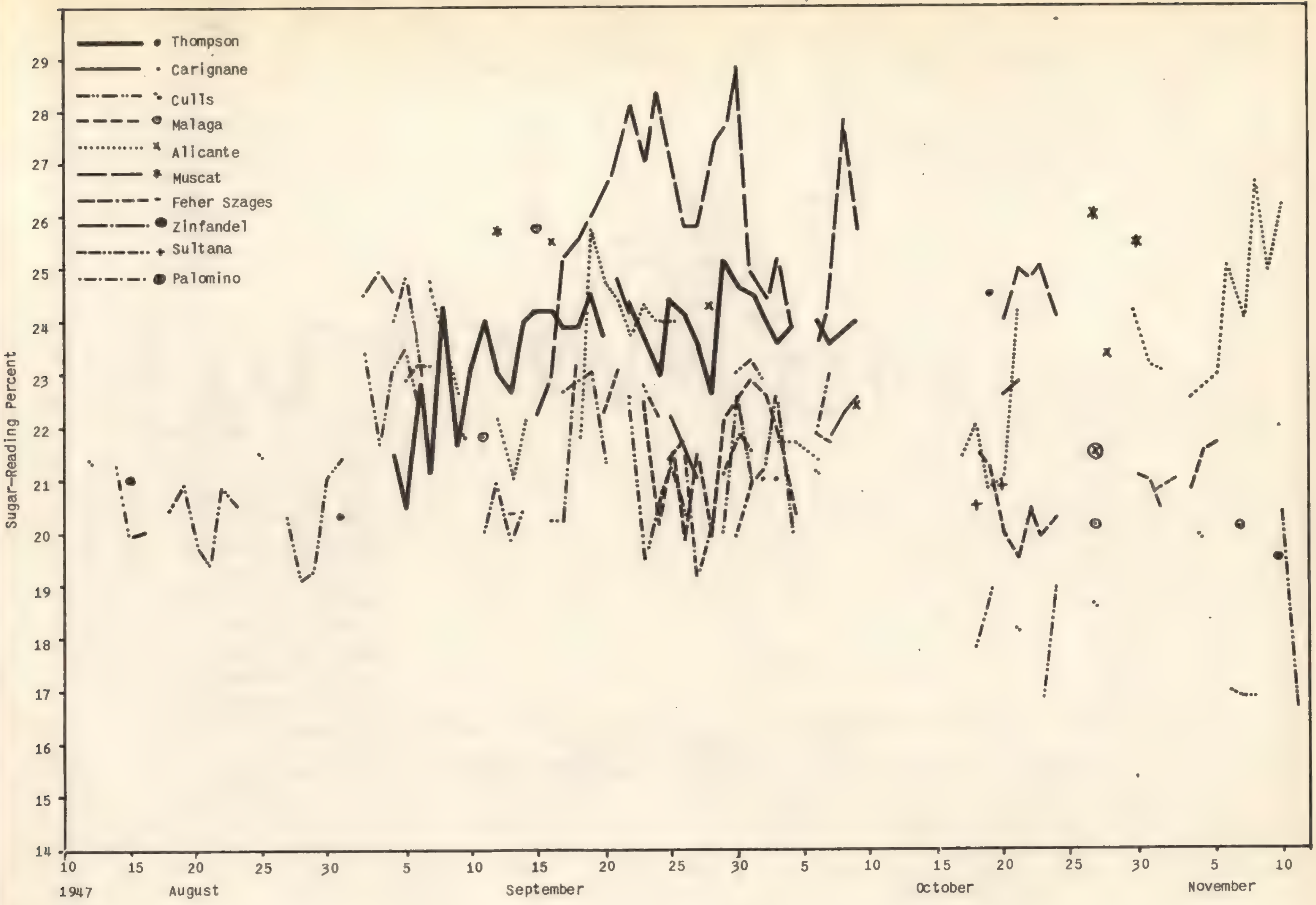


Fig. 30a. Average Sugar-Readings by Variety and Date of Delivery, Reedley, 1947

Fig. 31a. Average Sugar-Readings by Variety and Date of Delivery, Escalon, 1948

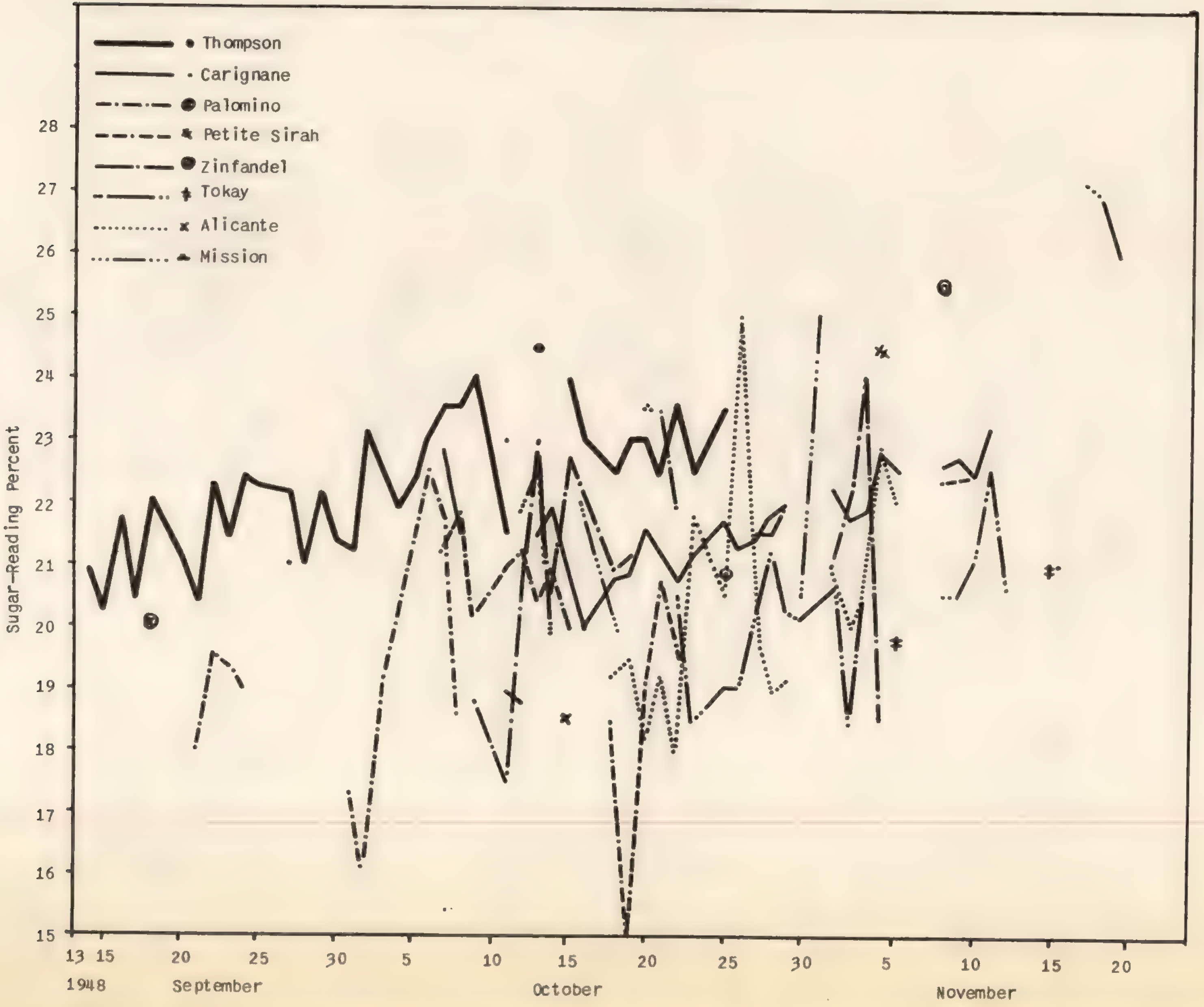


Fig. 32a. Average Sugar-Readings by Variety and Date of Delivery, Lodi, 1948

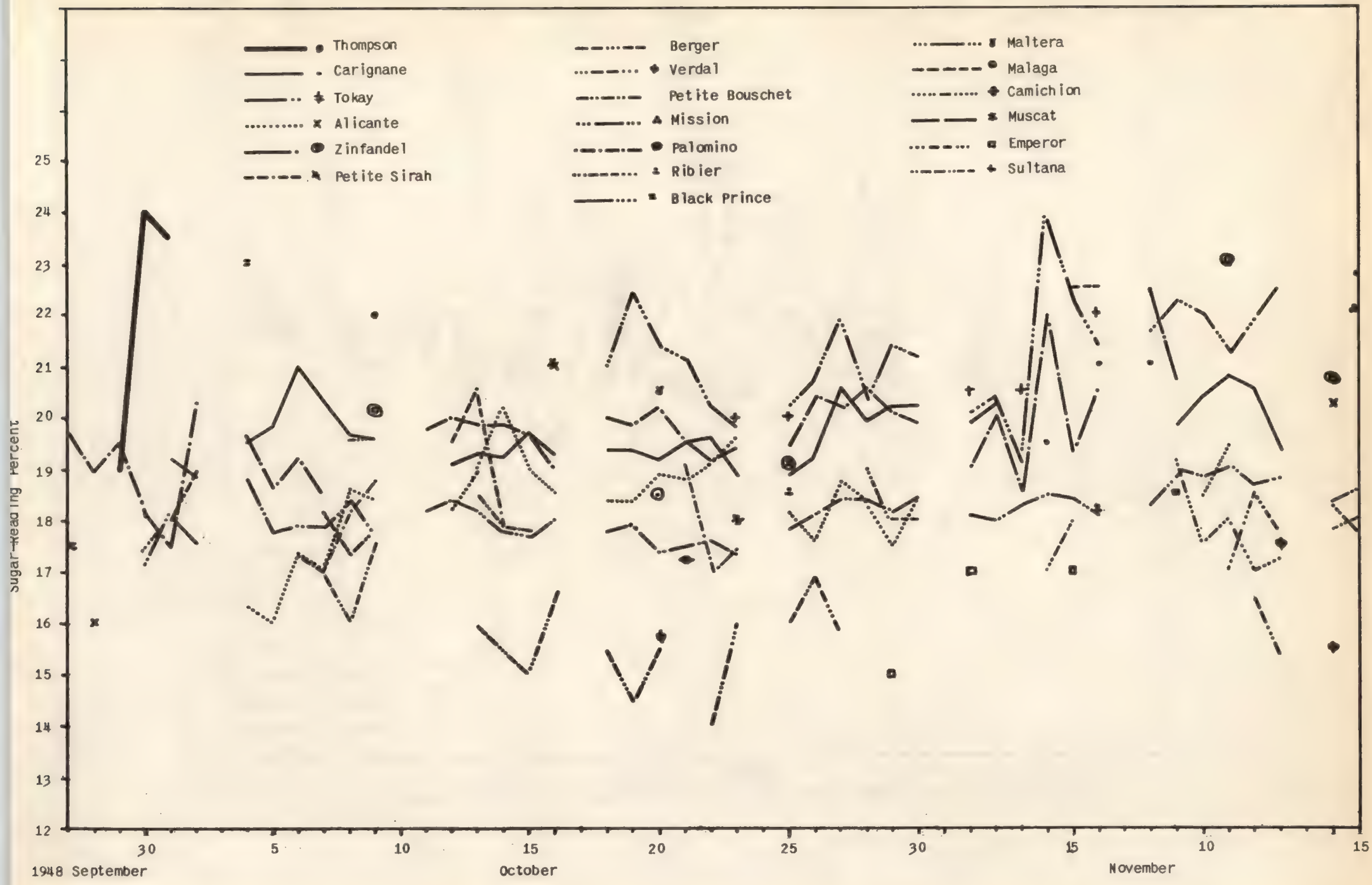


FIG. 33a. ANNUAL AVERAGE 1945-1948 AND 1946 AND 1949 ADJUSTED GROSS COMMERCIAL PRODUCTION OF STILL WINE BY KINDS AND BY DISTRICTS

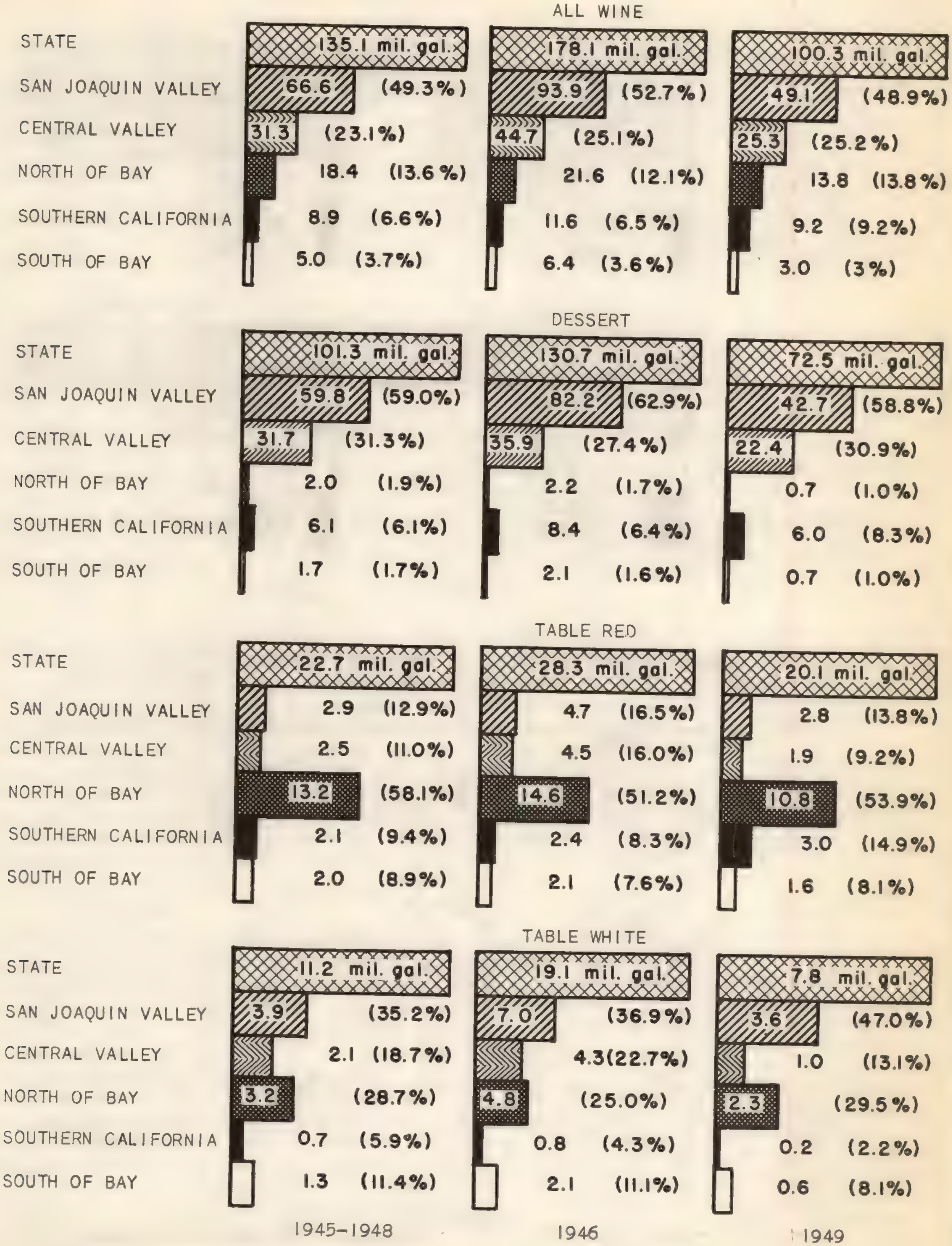


FIG. 34a. CALIFORNIA ADJUSTED AVERAGE ANNUAL GROSS PRODUCTION OF STILL DESSERT AND TABLE WINES BY DISTRICTS DURING JULY 1 – DECEMBER 31, 1945 – 1948

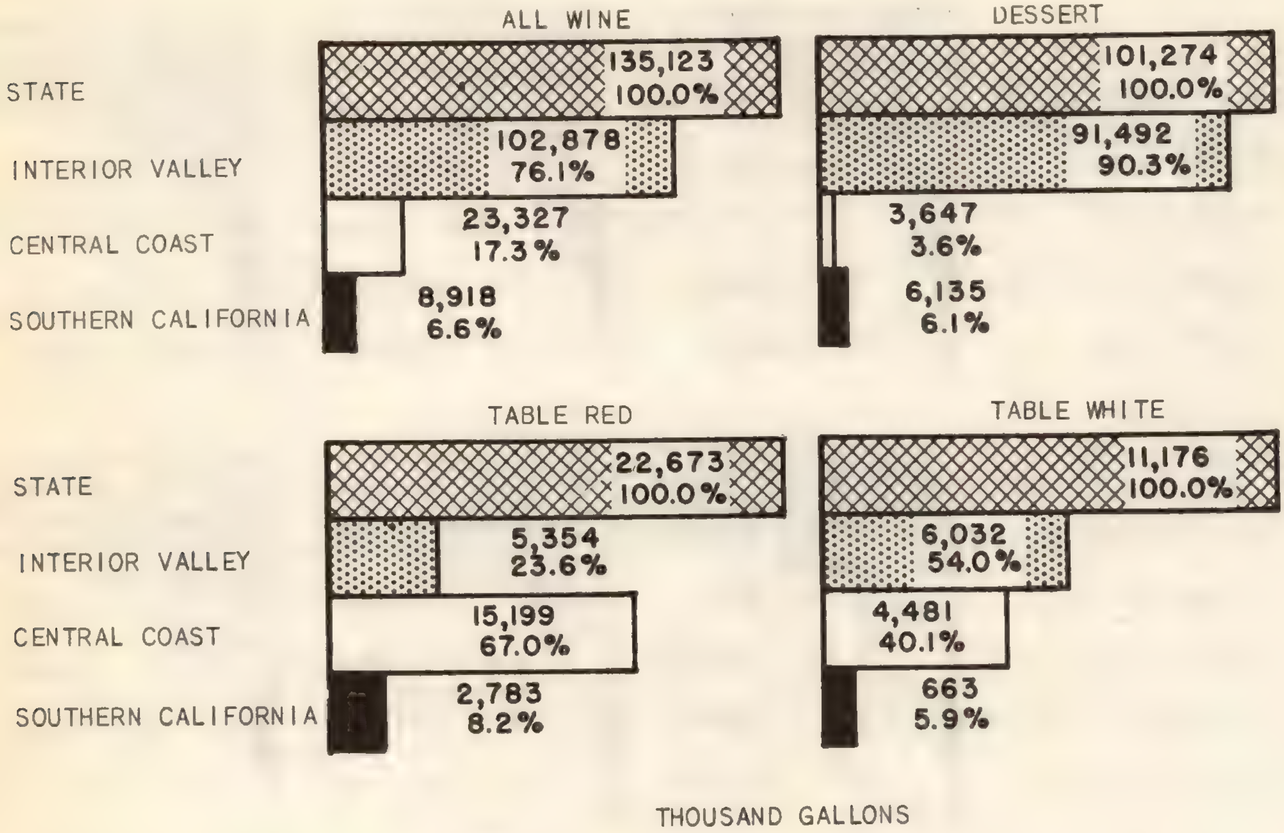


Fig. 35a. Central Coast Gross Still Wine Production as Percent of Total State, by Classes, July 1– December 31, 1937 – 1949

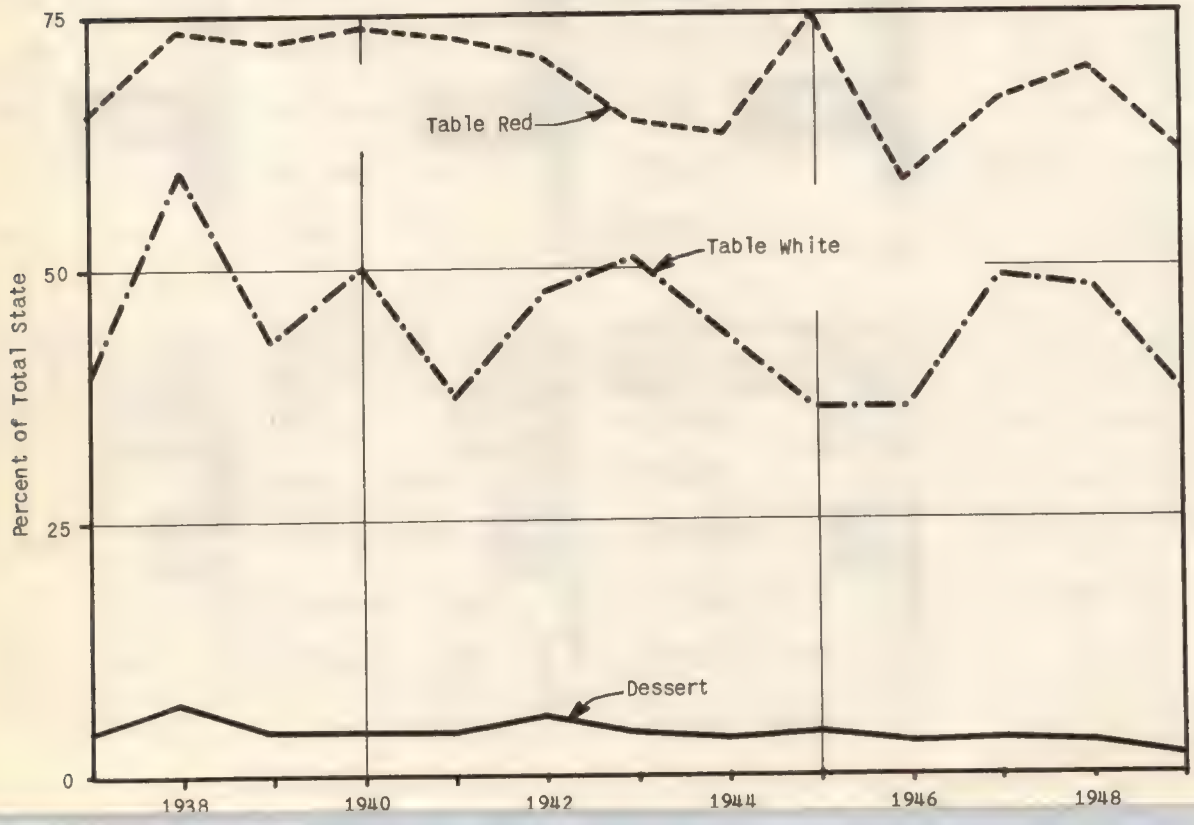


Fig. 36a. North of Bay Gross Still Wine Production by Classes During July - December 1937-1949

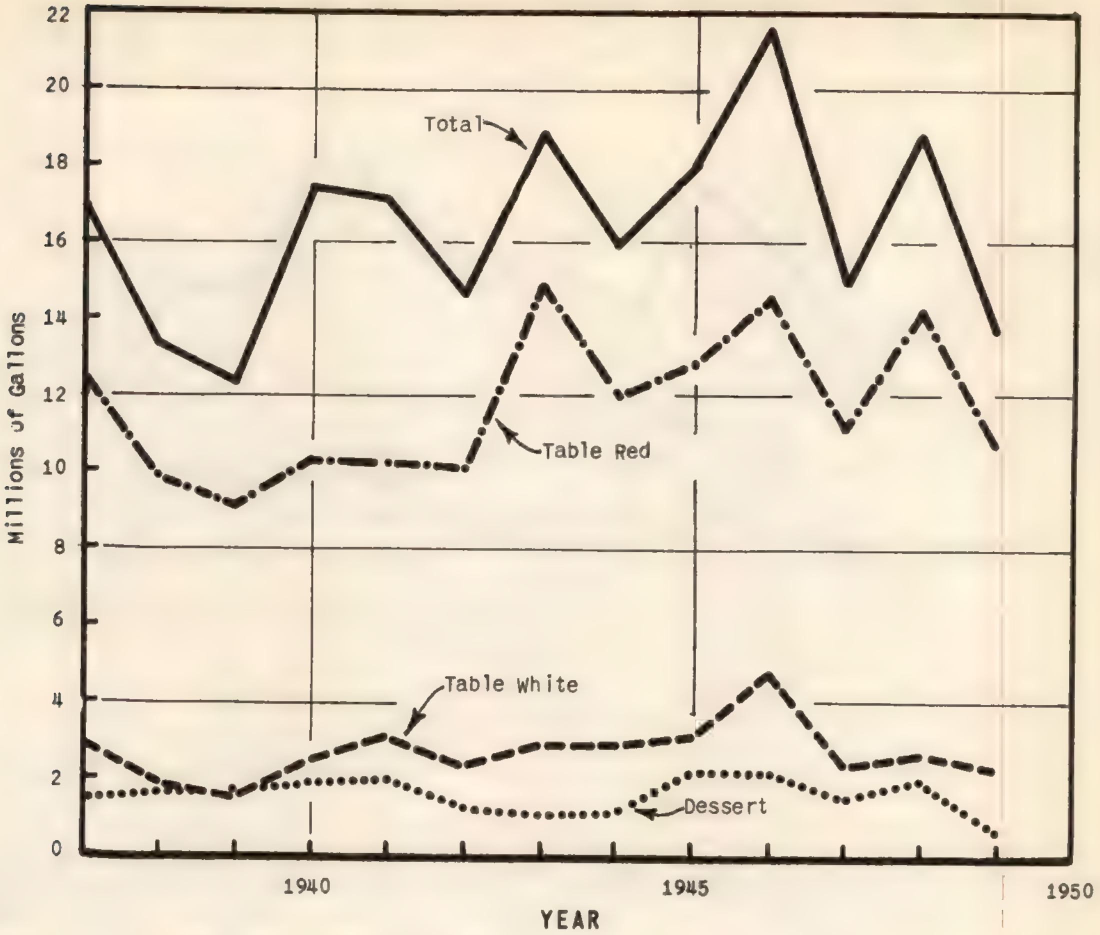


Fig. 37a. North of Bay Gross Still Wine Production, as Percent of Total State, by Classes, July 1 - December 31, 1937-1949

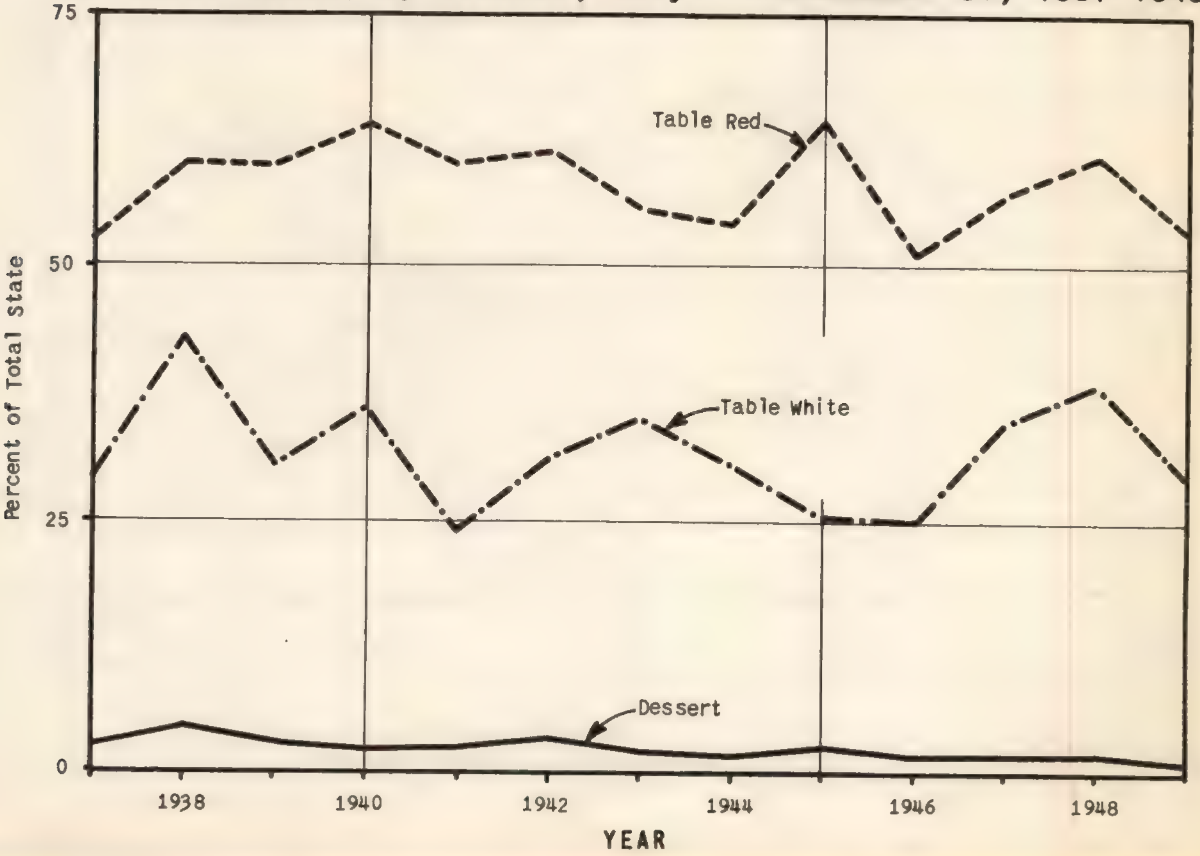


Fig. 38a. South of Bay Gross Still Wine Production by Classes During July - December 1939-1949

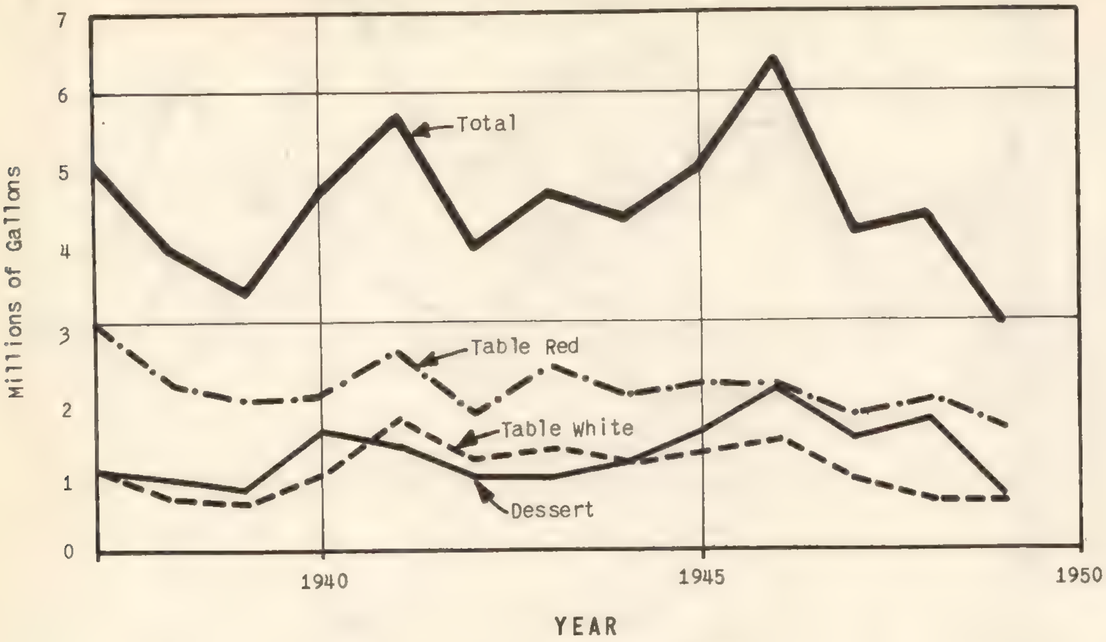


Fig. 39a. South of Bay Gross Still Wine Production as Percent of Total State, by Classes, July 1 - December 31, 1937-1949

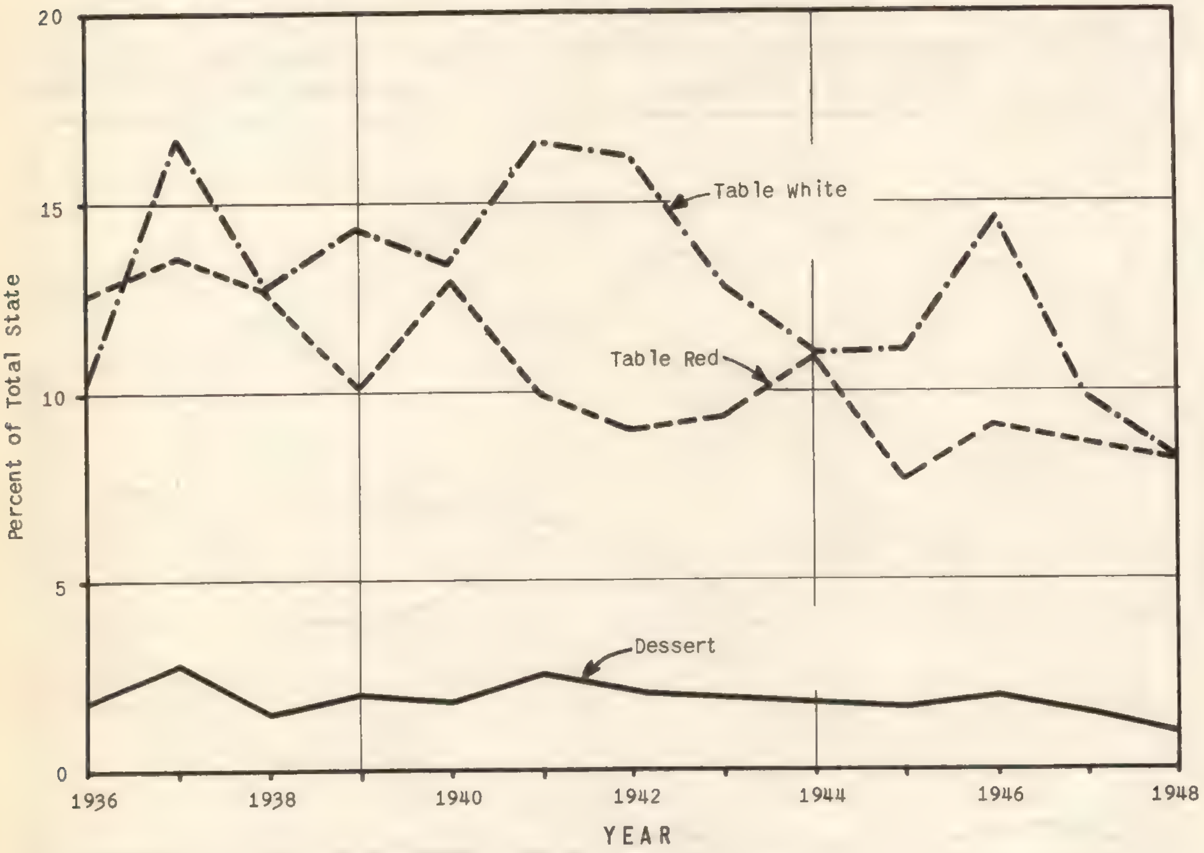


Fig. 40a. Southern California Gross Still Wine Production as Percent of Total State, by Classes, July 1 - December 31, 1937 - 1949

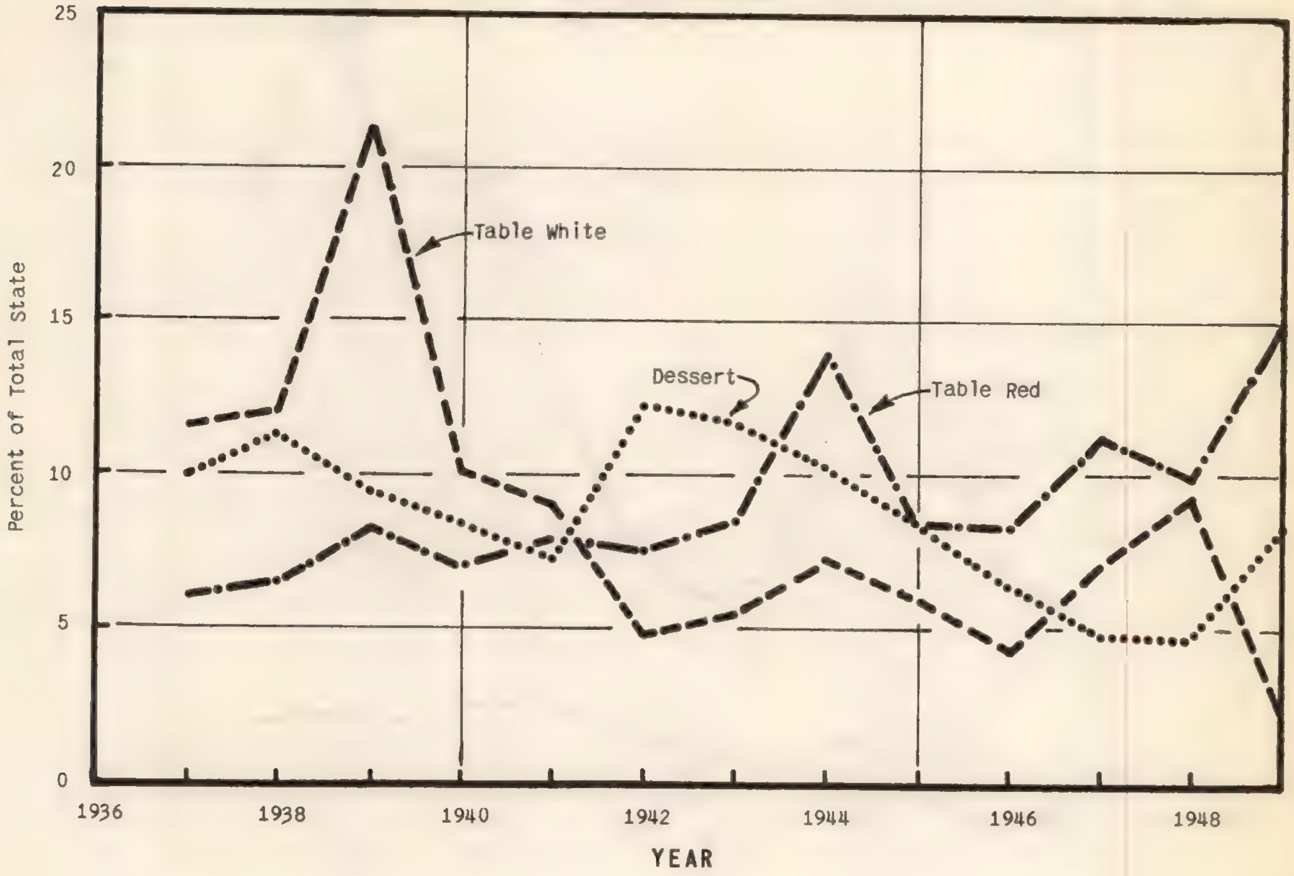


Fig. 41a. Inventories and Apparent Consumption of California Wine in All Markets, 1938-1949

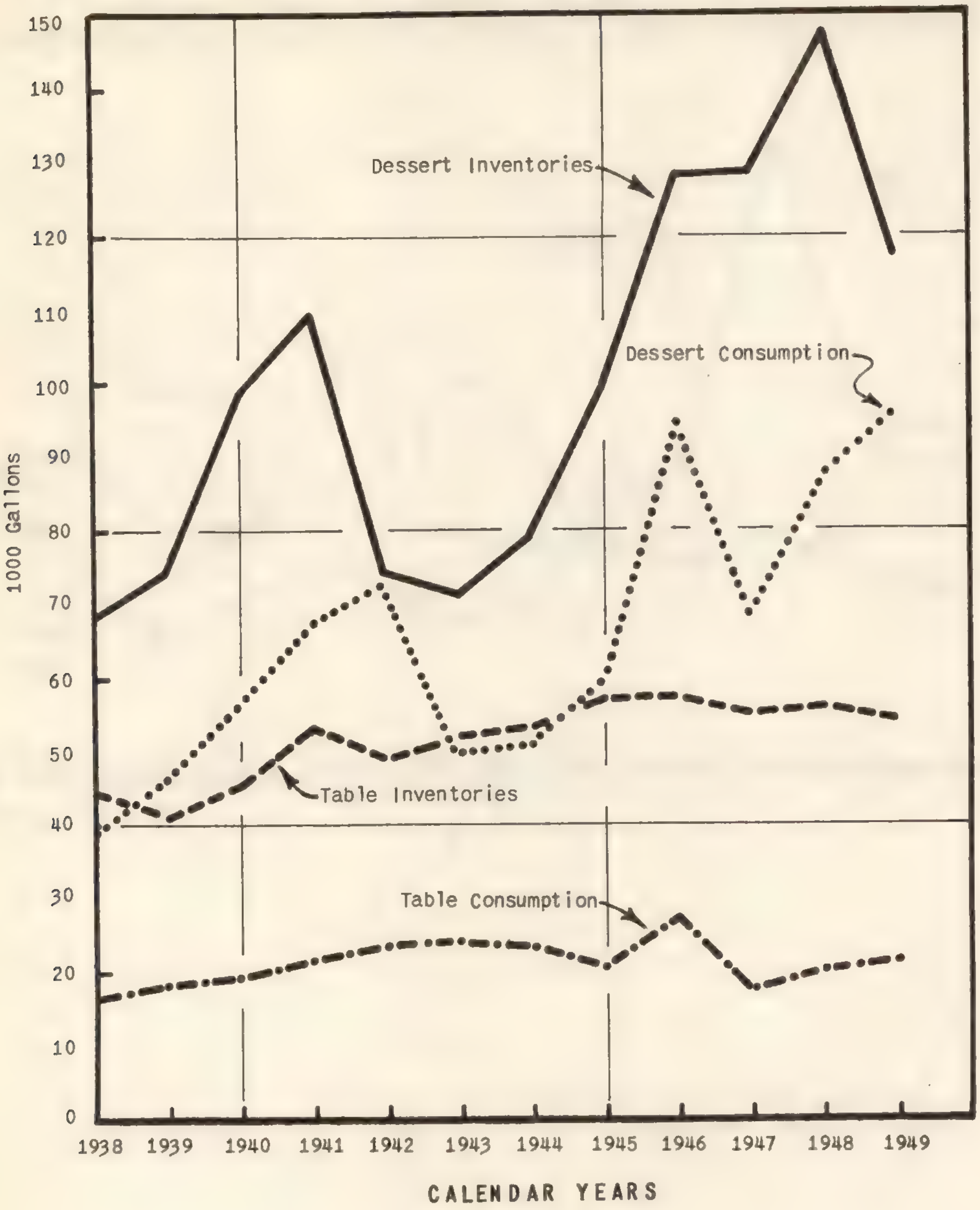
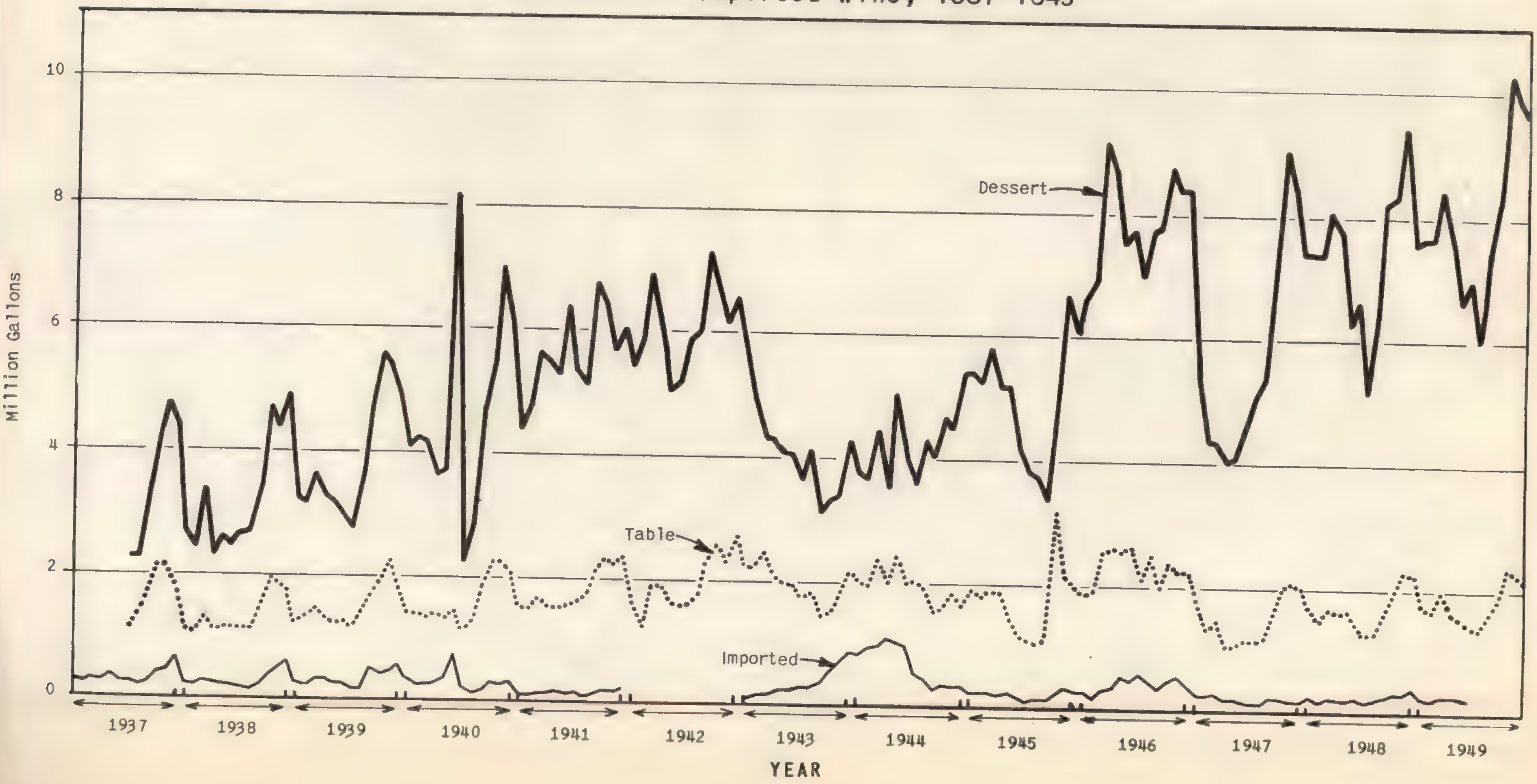


Fig. 42a. Monthly United States Apparent Consumption of California Table and Dessert Wine and of Imported Wine, 1937-1949



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Economic Situation and Market Organization in the California Grape Industries

by

George L. Mehren

Appendix B

Geographic Distribution of California Grape Production and Processing

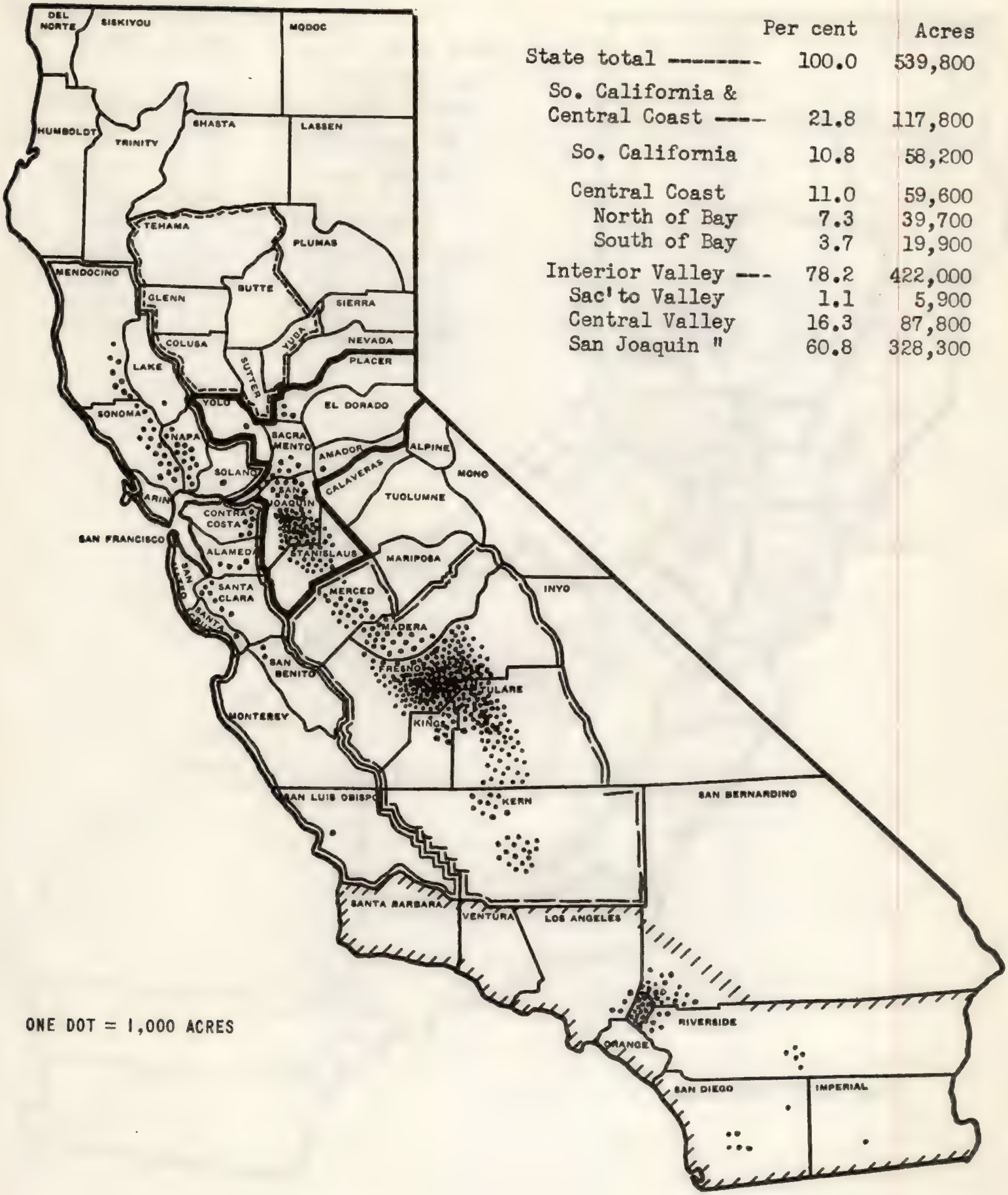
Map Number	Title of map	Pages
1 to 4	Grape acreage	1b to 4b
5 to 7	Grape production	5b to 7b
8 to 9	Crush	8b to 9b
10 to 12	Wineries, distilleries, storage cooperage	10b to 12b
13 to 19	Wine production	13b to 19b

May, 1950

Contribution from the
Giannini Foundation of Agricultural Economics
Mimeographed Report No. 107

Map 1. Grape Acreage, All Varieties, All Ages, 1948

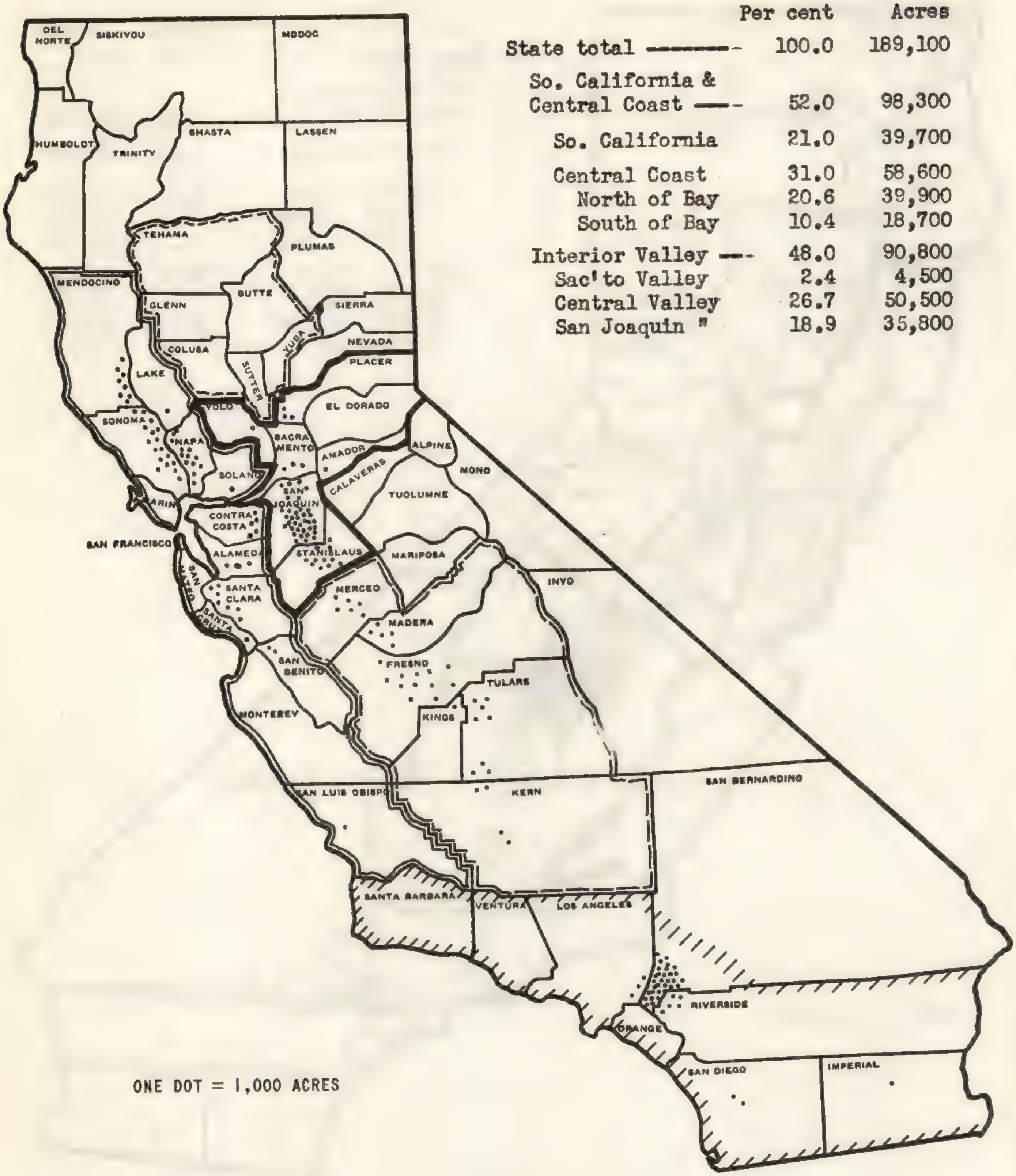
	Per cent	Acres
State total	100.0	539,800
So. California & Central Coast	21.8	117,800
So. California	10.8	58,200
Central Coast	11.0	59,600
North of Bay	7.3	39,700
South of Bay	3.7	19,900
Interior Valley	78.2	422,000
Sac'to Valley	1.1	5,900
Central Valley	16.3	87,800
San Joaquin "	60.8	328,300



ONE DOT = 1,000 ACRES

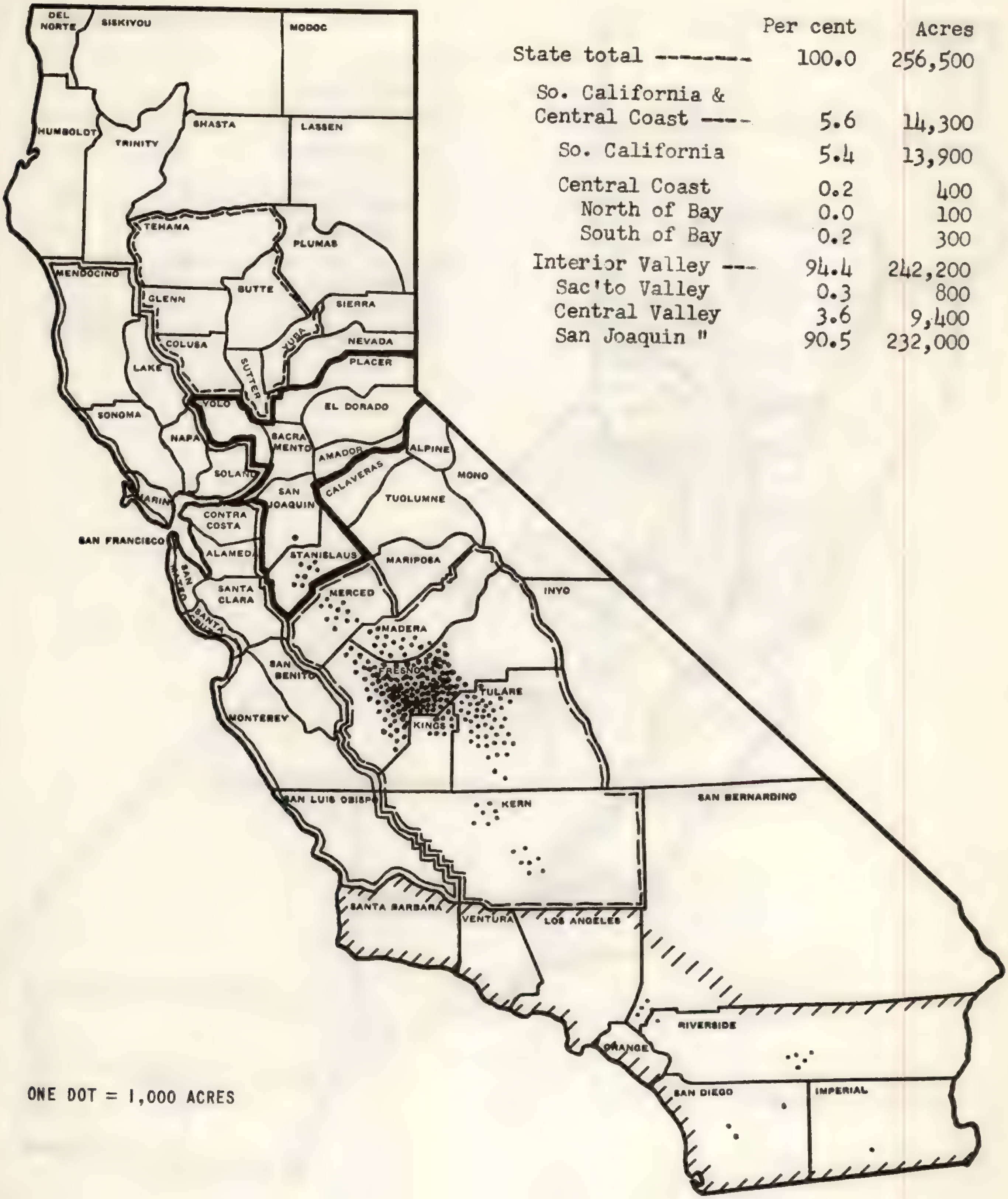
Map 2. Grape Acreage, Wine Varieties, All Ages, 1948

	Per cent	Acres
State total	100.0	189,100
So. California & Central Coast	52.0	98,300
So. California	21.0	39,700
Central Coast	31.0	58,600
North of Bay	20.6	39,900
South of Bay	10.4	18,700
Interior Valley	48.0	90,800
Sac'to Valley	2.4	4,500
Central Valley	26.7	50,500
San Joaquin "	18.9	35,800



ONE DOT = 1,000 ACRES

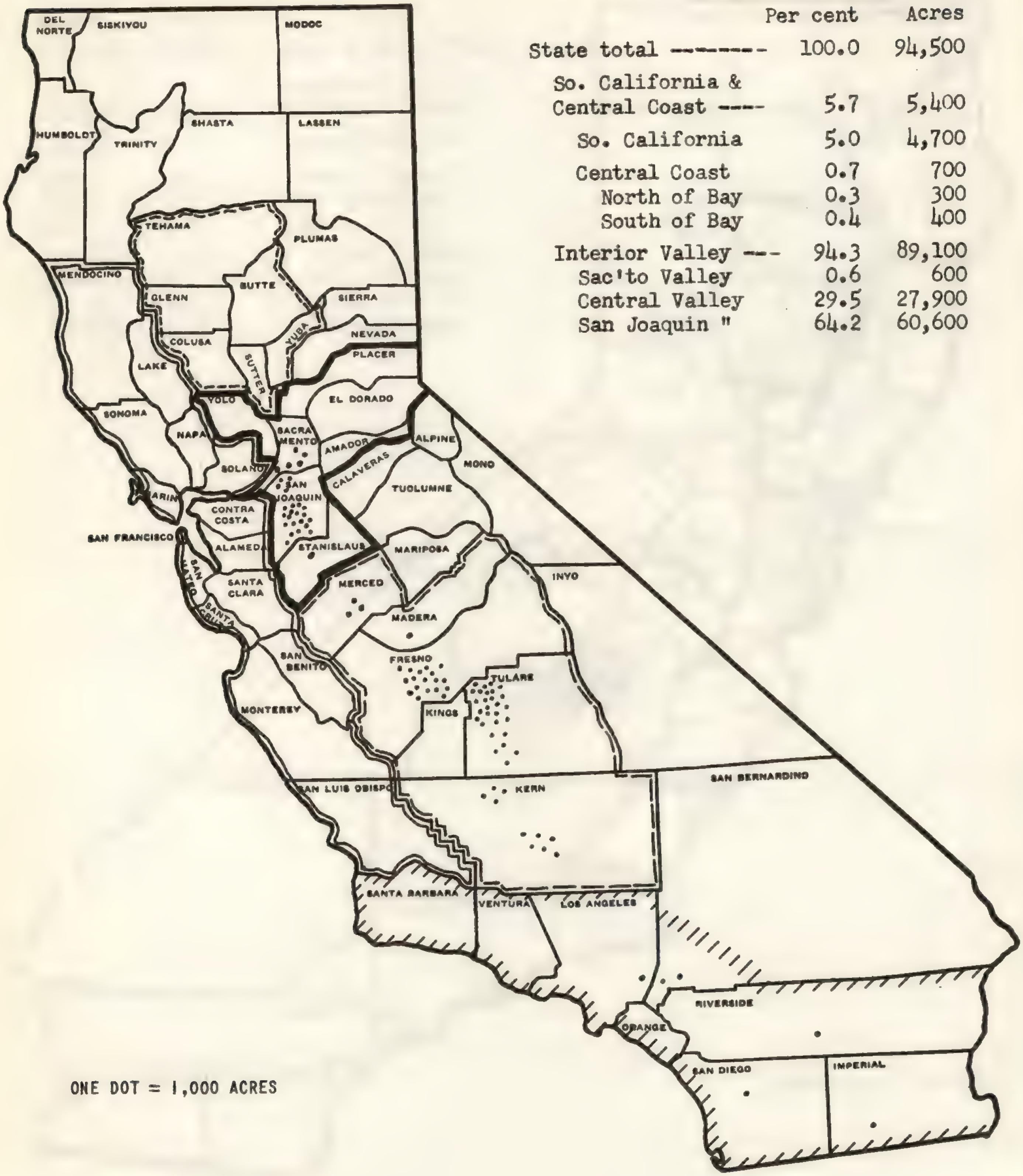
Map 3. Grape Acreage, Raisin Varieties, All Ages, 1948



	Per cent	Acres
State total --------	100.0	256,500
So. California & Central Coast ----	5.6	14,300
So. California	5.4	13,900
Central Coast	0.2	400
North of Bay	0.0	100
South of Bay	0.2	300
Interior Valley ---	94.4	242,200
Sac'to Valley	0.3	800
Central Valley	3.6	9,400
San Joaquin "	90.5	232,000

ONE DOT = 1,000 ACRES

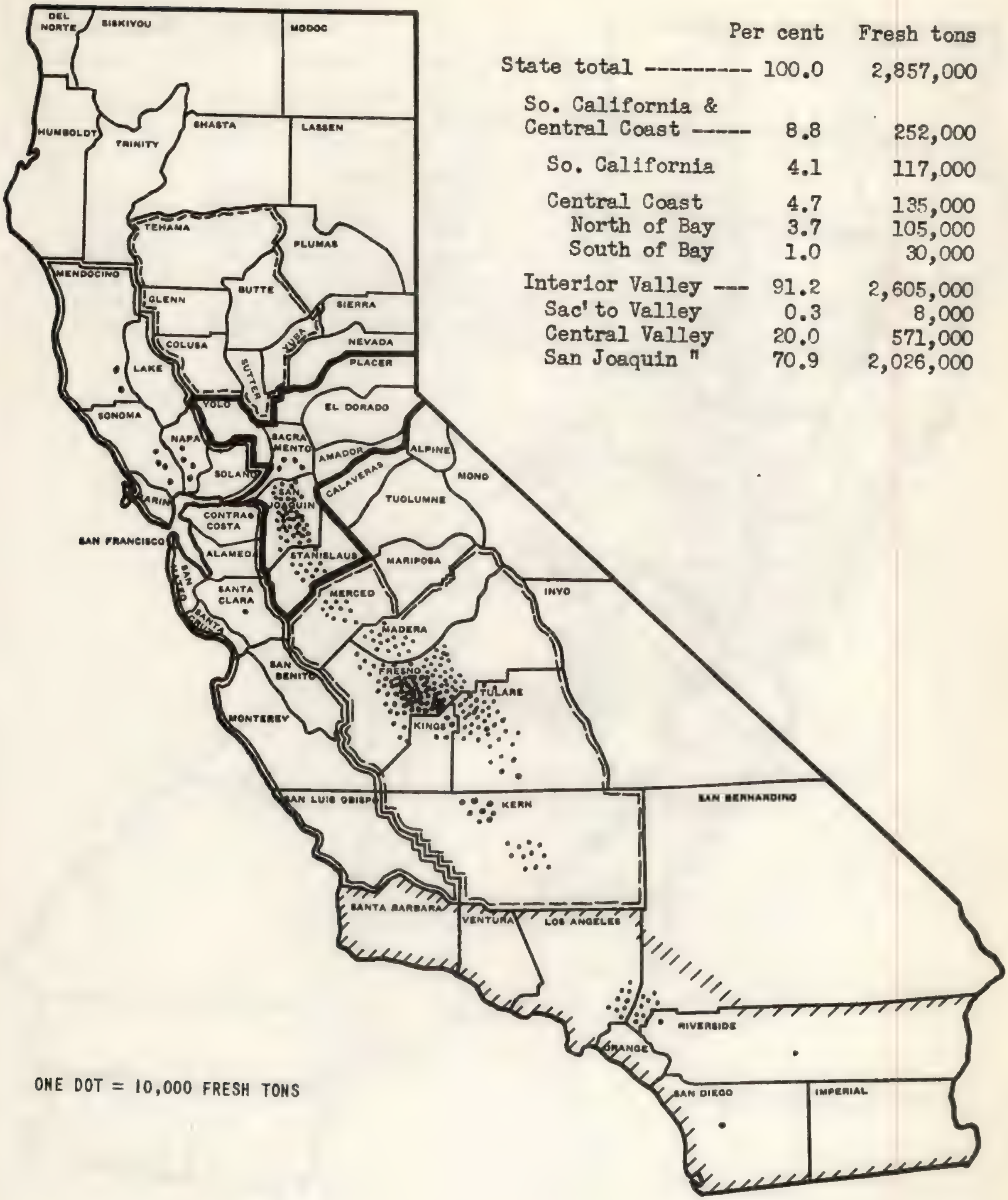
Map 4. Grape Acreage, Table Varieties, All Ages, 1948



	Per cent	Acres
State total --------	100.0	94,500
So. California & Central Coast ----	5.7	5,400
So. California	5.0	4,700
Central Coast	0.7	700
North of Bay	0.3	300
South of Bay	0.4	400
Interior Valley ---	94.3	89,100
Sac'to Valley	0.6	600
Central Valley	29.5	27,900
San Joaquin "	64.2	60,600

ONE DOT = 1,000 ACRES

Map 5. Grape Production, All Varieties, All Uses, 1948

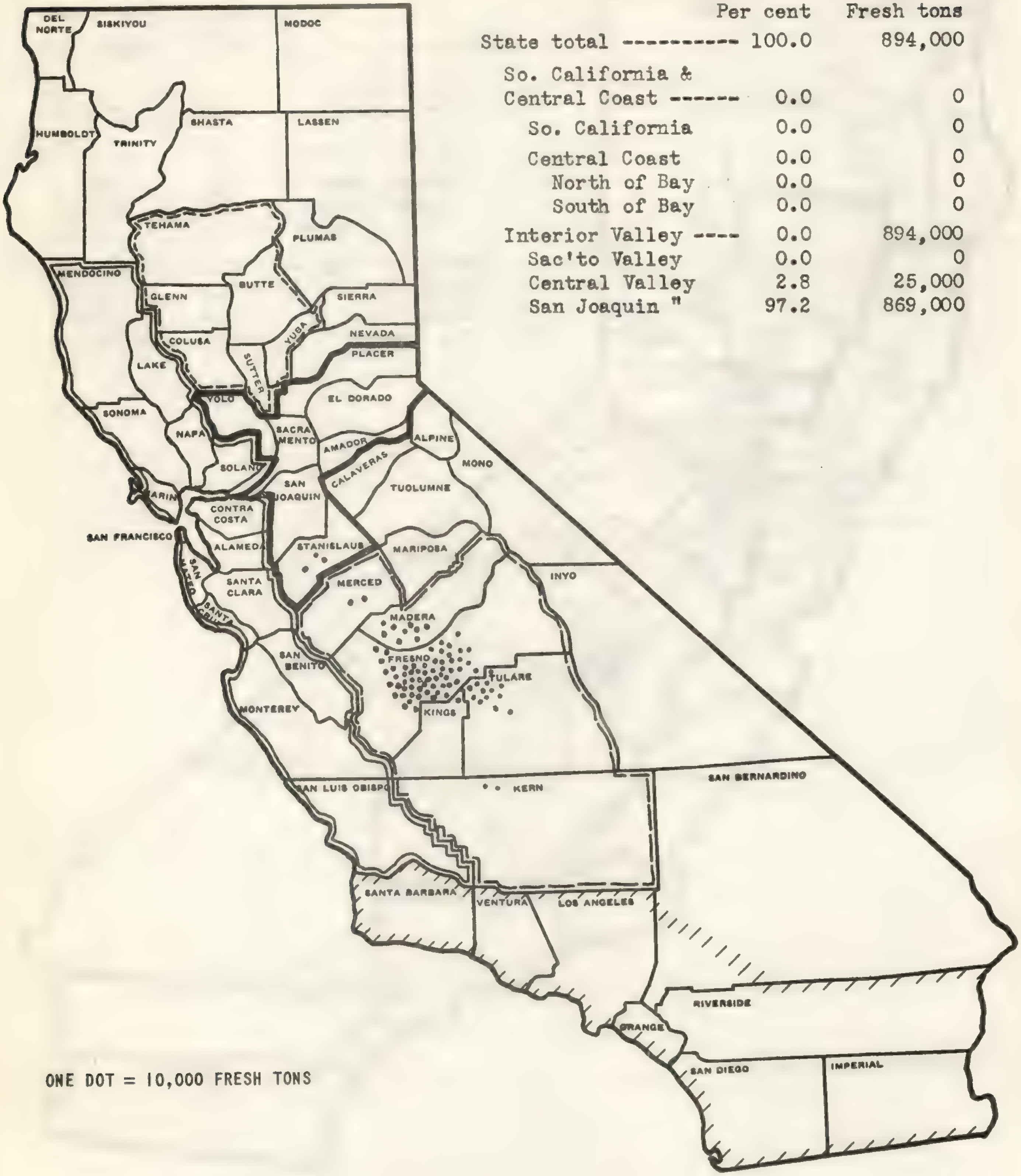


	Per cent	Fresh tons
State total ----------	100.0	2,857,000
So. California & Central Coast -----	8.8	252,000
So. California	4.1	117,000
Central Coast	4.7	135,000
North of Bay	3.7	105,000
South of Bay	1.0	30,000
Interior Valley ---	91.2	2,605,000
Sac'to Valley	0.3	8,000
Central Valley	20.0	571,000
San Joaquin "	70.9	2,026,000

ONE DOT = 10,000 FRESH TONS

Map 6. Grape Production Used for Dried Raisins, 1948

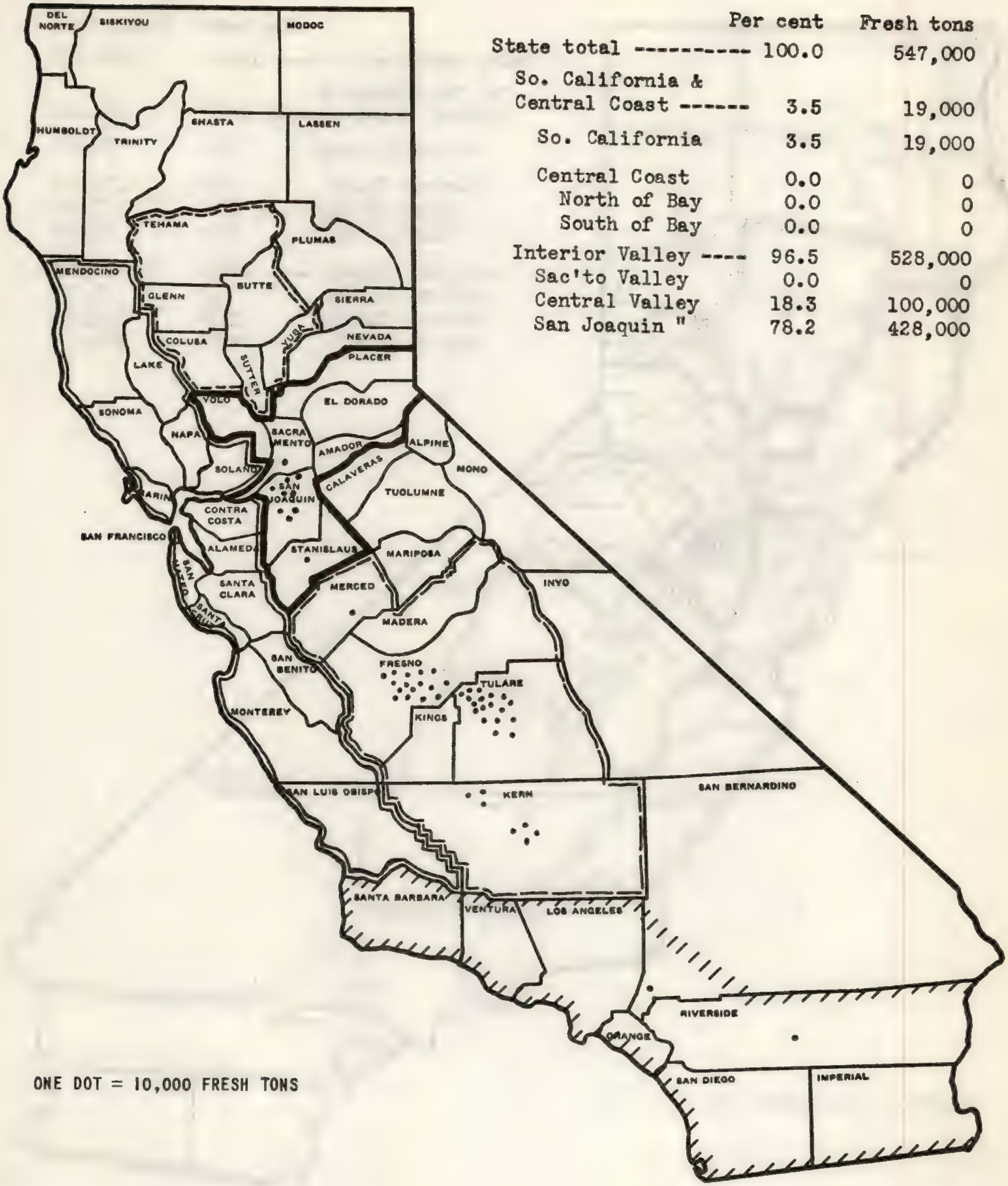
	Per cent	Fresh tons
State total ----------	100.0	894,000
So. California & Central Coast ------	0.0	0
So. California	0.0	0
Central Coast	0.0	0
North of Bay	0.0	0
South of Bay	0.0	0
Interior Valley ----	0.0	894,000
Sac'to Valley	0.0	0
Central Valley	2.8	25,000
San Joaquin "	97.2	869,000



ONE DOT = 10,000 FRESH TONS

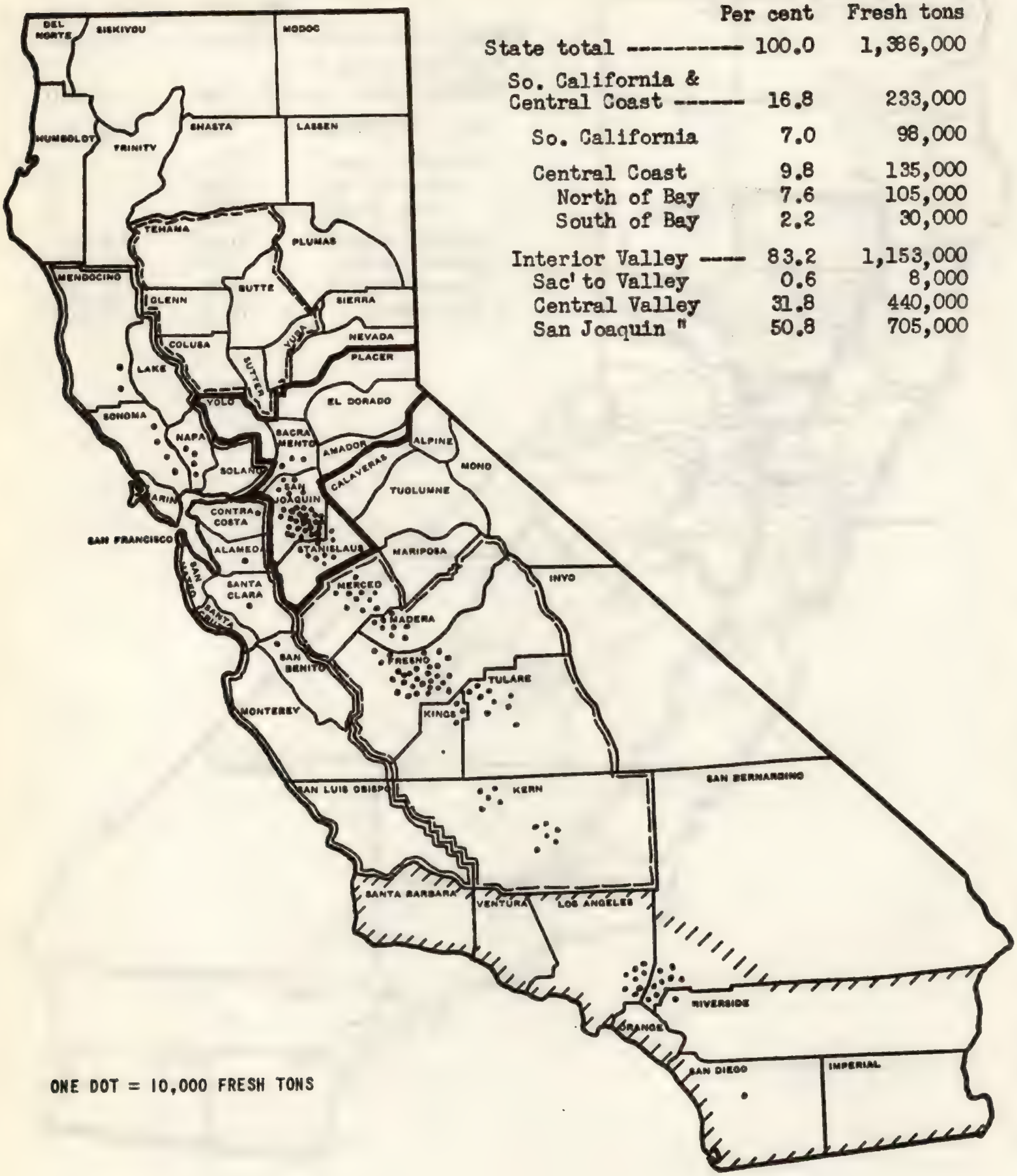
Map 7. Grape Production Shipped Fresh as Table and Juice Stock, 1948

	Per cent	Fresh tons
State total	100.0	547,000
So. California & Central Coast	3.5	19,000
So. California	3.5	19,000
Central Coast	0.0	0
North of Bay	0.0	0
South of Bay	0.0	0
Interior Valley	96.5	528,000
Sac'to Valley	0.0	0
Central Valley	18.3	100,000
San Joaquin "	78.2	428,000



ONE DOT = 10,000 FRESH TONS

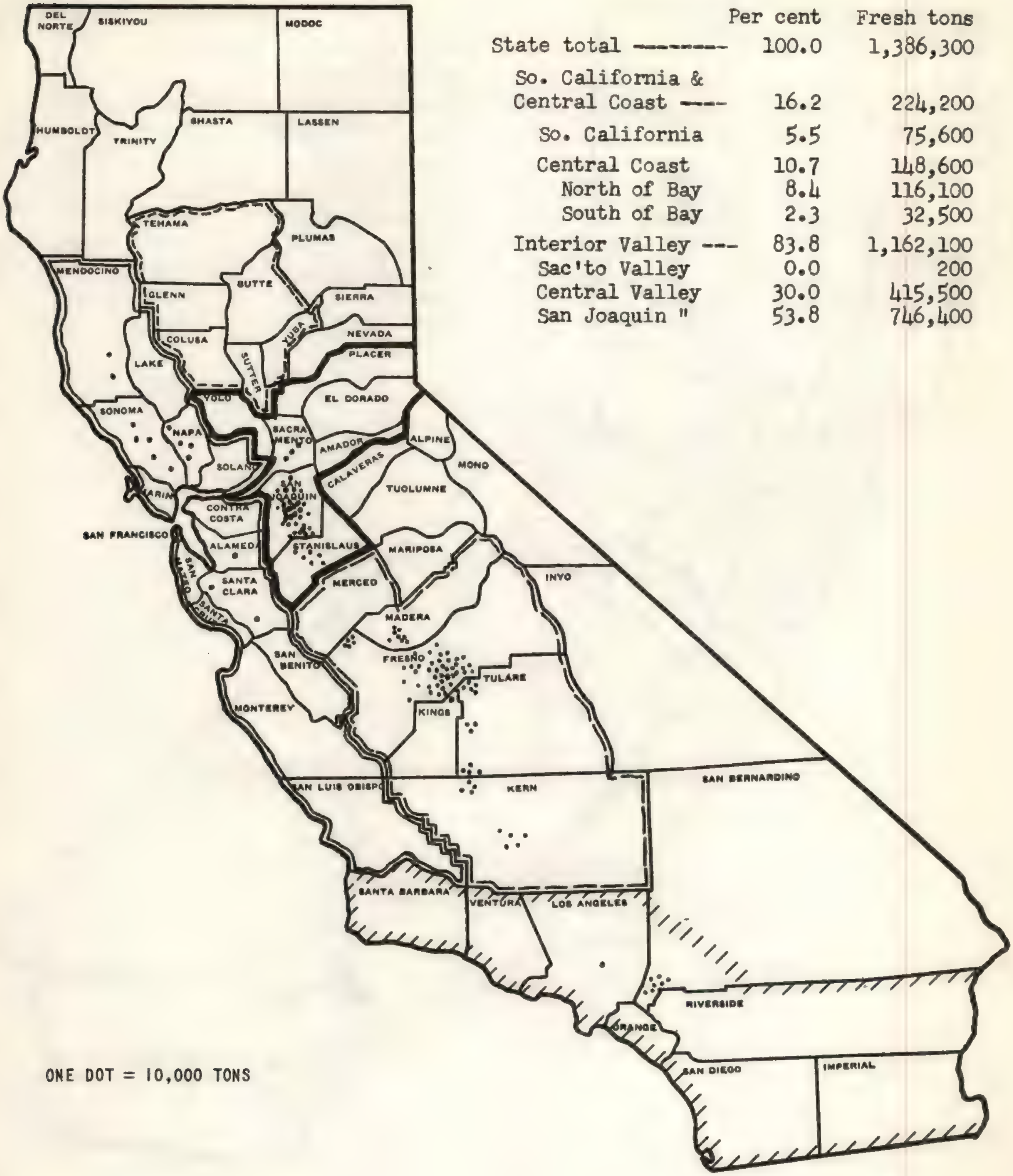
Map 8. Total Commercial Grape Crush by County Where Grown, 1948



	Per cent	Fresh tons
State total	100.0	1,386,000
So. California & Central Coast	16.8	233,000
So. California	7.0	98,000
Central Coast	9.8	135,000
North of Bay	7.6	105,000
South of Bay	2.2	30,000
Interior Valley	83.2	1,153,000
Sac' to Valley	0.6	8,000
Central Valley	31.8	440,000
San Joaquin "	50.8	705,000

ONE DOT = 10,000 FRESH TONS

Map 9. Total Commercial Grape Crush by County Where Crushed, 1948

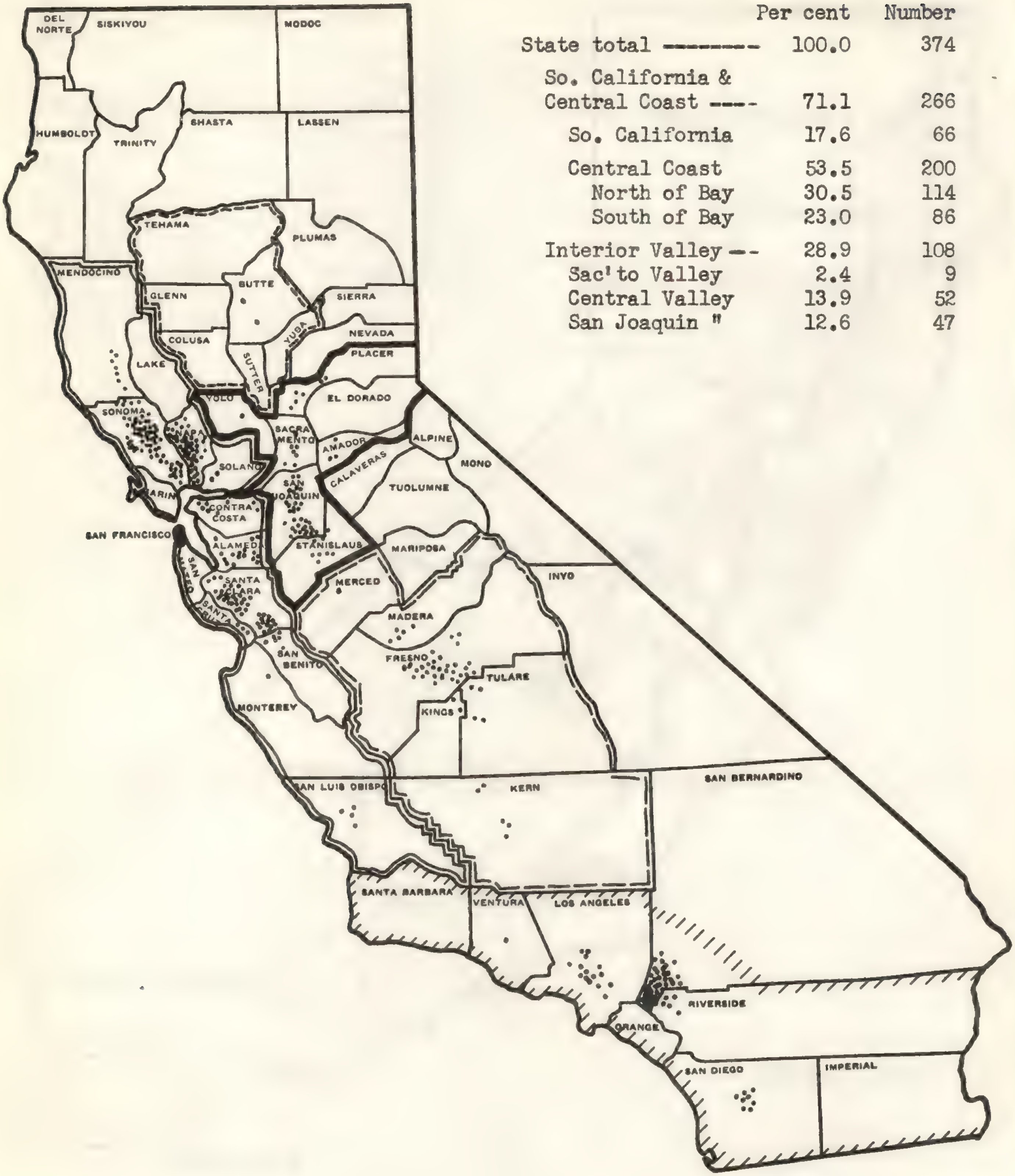


	Per cent	Fresh tons
State total --------	100.0	1,386,300
So. California & Central Coast ----	16.2	224,200
So. California	5.5	75,600
Central Coast	10.7	148,600
North of Bay	8.4	116,100
South of Bay	2.3	32,500
Interior Valley ---	83.8	1,162,100
Sac'to Valley	0.0	200
Central Valley	30.0	415,500
San Joaquin "	53.8	746,400

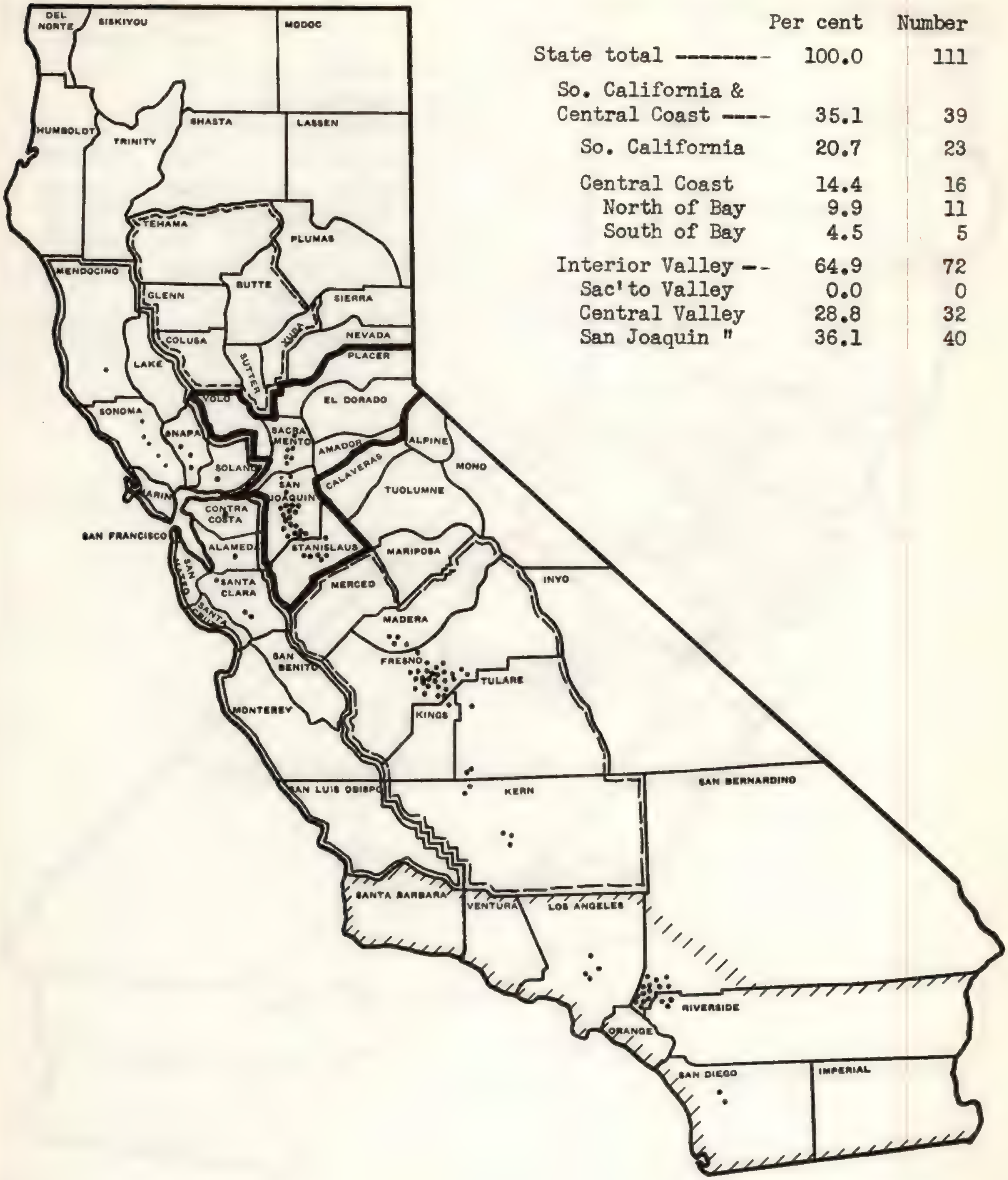
ONE DOT = 10,000 TONS

Map 10. Bonded Wineries, February, 1950

	Per cent	Number
State total --------	100.0	374
So. California & Central Coast ----	71.1	266
So. California	17.6	66
Central Coast	53.5	200
North of Bay	30.5	114
South of Bay	23.0	86
Interior Valley ---	28.9	108
Sac'to Valley	2.4	9
Central Valley	13.9	52
San Joaquin "	12.6	47



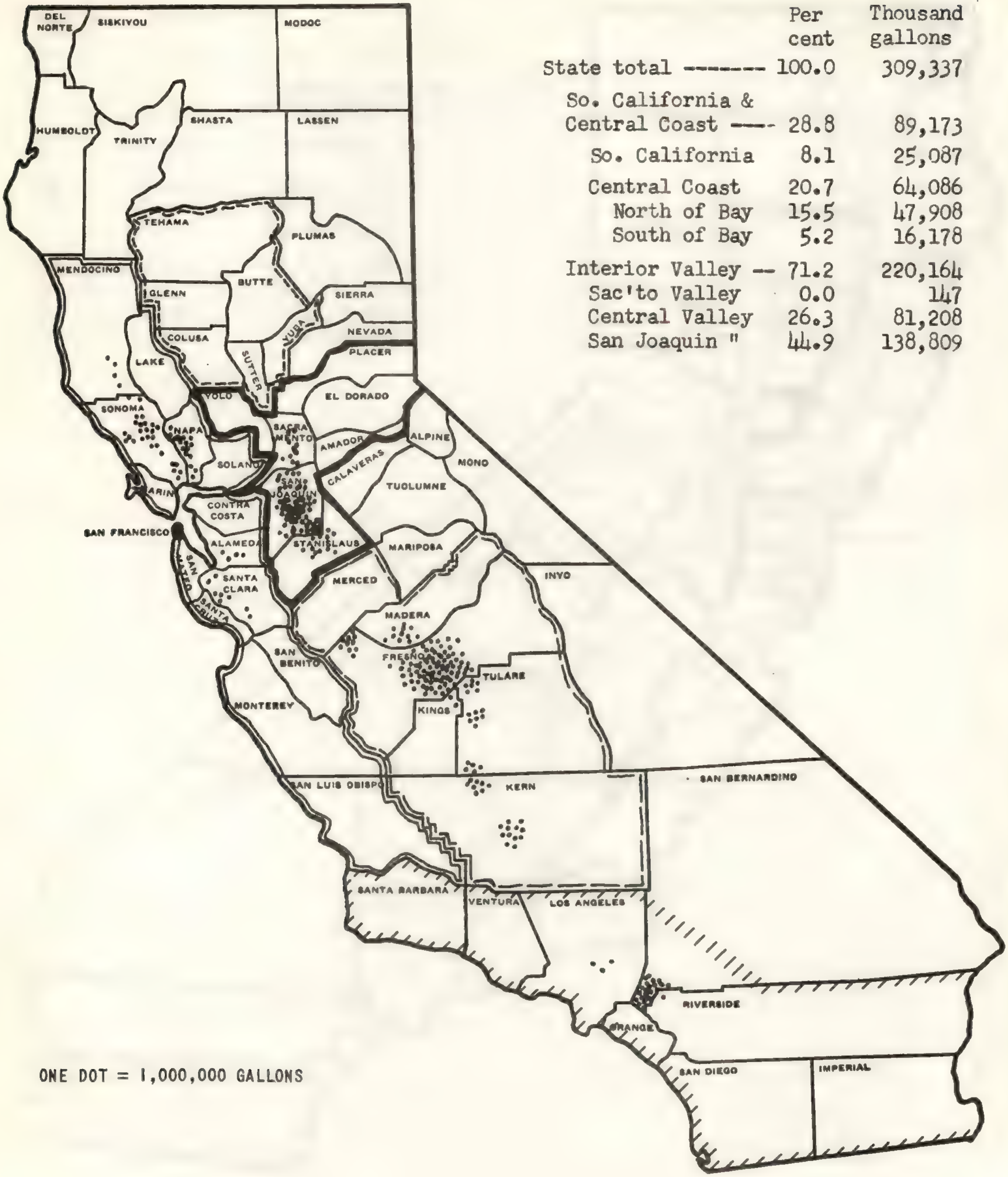
Map II. Fruit Distilleries, February, 1950



	Per cent	Number
State total --------	100.0	111
So. California & Central Coast ----	35.1	39
So. California	20.7	23
Central Coast	14.4	16
North of Bay	9.9	11
South of Bay	4.5	5
Interior Valley --	64.9	72
Sac'to Valley	0.0	0
Central Valley	28.8	32
San Joaquin "	36.1	40

Map 12. Storage Cooperage, December 31, 1949

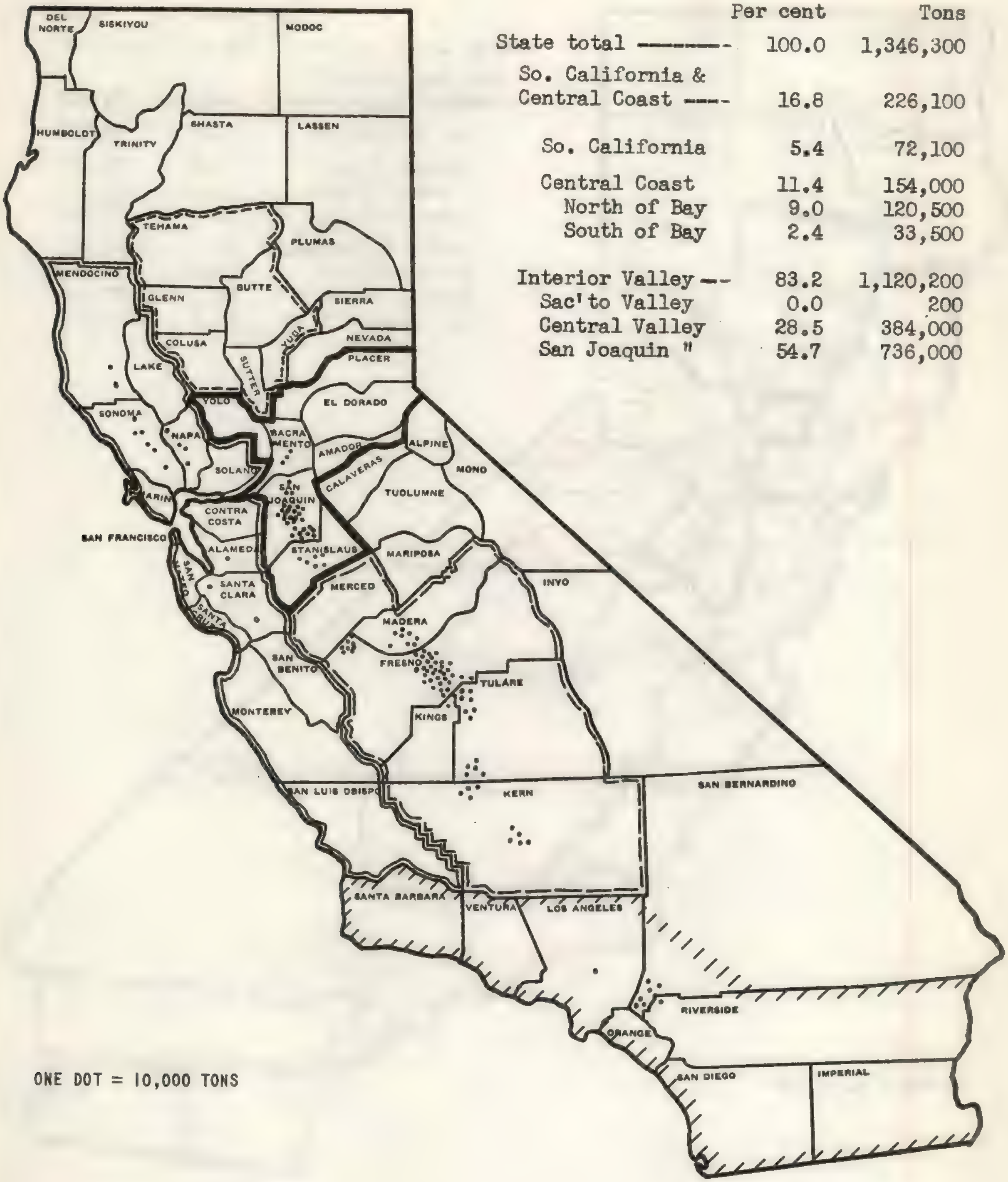
	Per cent	Thousand gallons
State total -------	100.0	309,337
So. California & Central Coast ----	28.8	89,173
So. California	8.1	25,087
Central Coast	20.7	64,086
North of Bay	15.5	47,908
South of Bay	5.2	16,178
Interior Valley --	71.2	220,164
Sac'to Valley	0.0	147
Central Valley	26.3	81,208
San Joaquin "	44.9	138,809



ONE DOT = 1,000,000 GALLONS

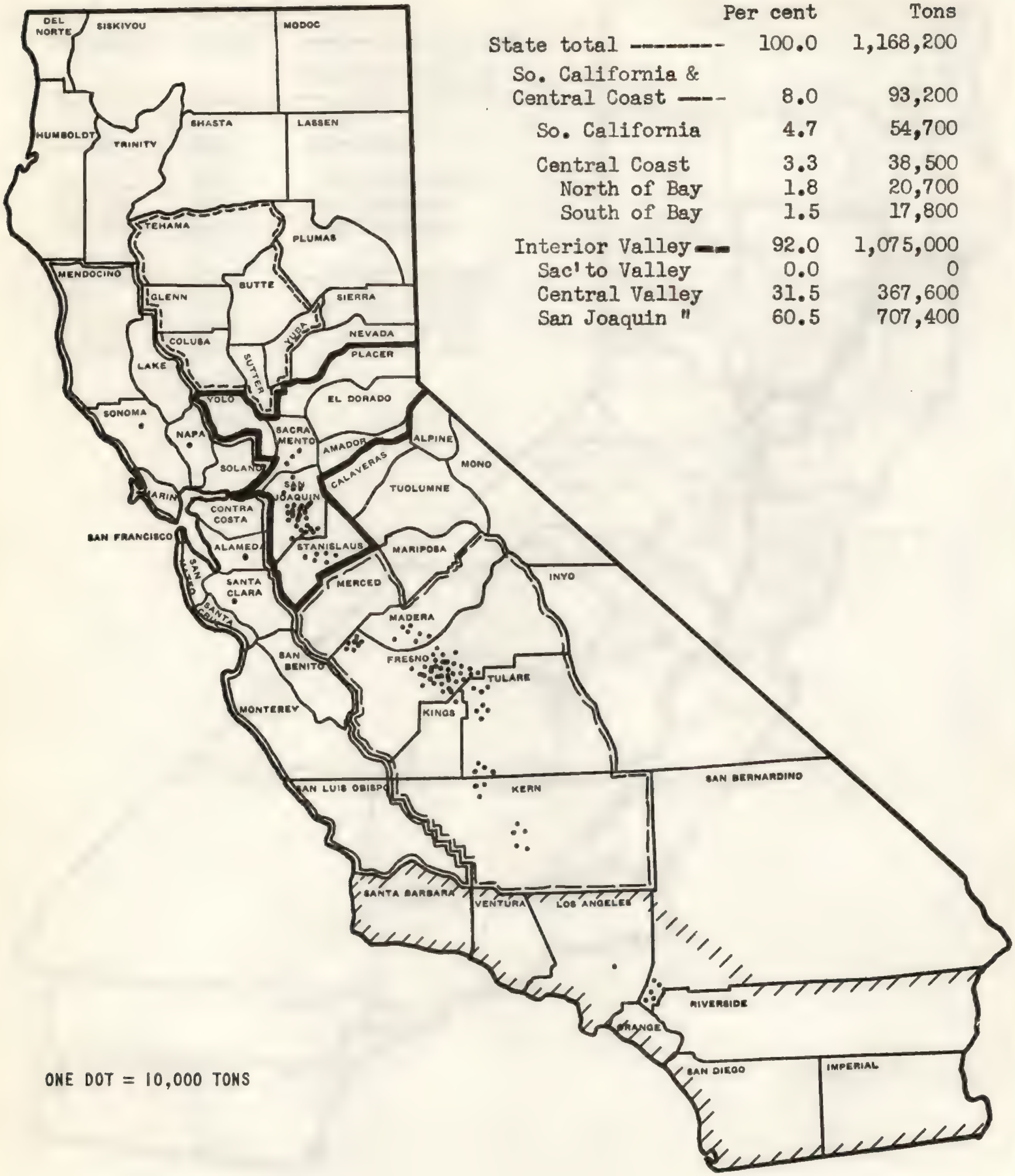
Map 13. Equivalent Total Grape Tonnage Used in Wine Production, 1948

	Per cent	Tons
State total	100.0	1,346,300
So. California & Central Coast	16.8	226,100
So. California	5.4	72,100
Central Coast	11.4	154,000
North of Bay	9.0	120,500
South of Bay	2.4	33,500
Interior Valley	83.2	1,120,200
Sac'to Valley	0.0	200
Central Valley	28.5	384,000
San Joaquin "	54.7	736,000



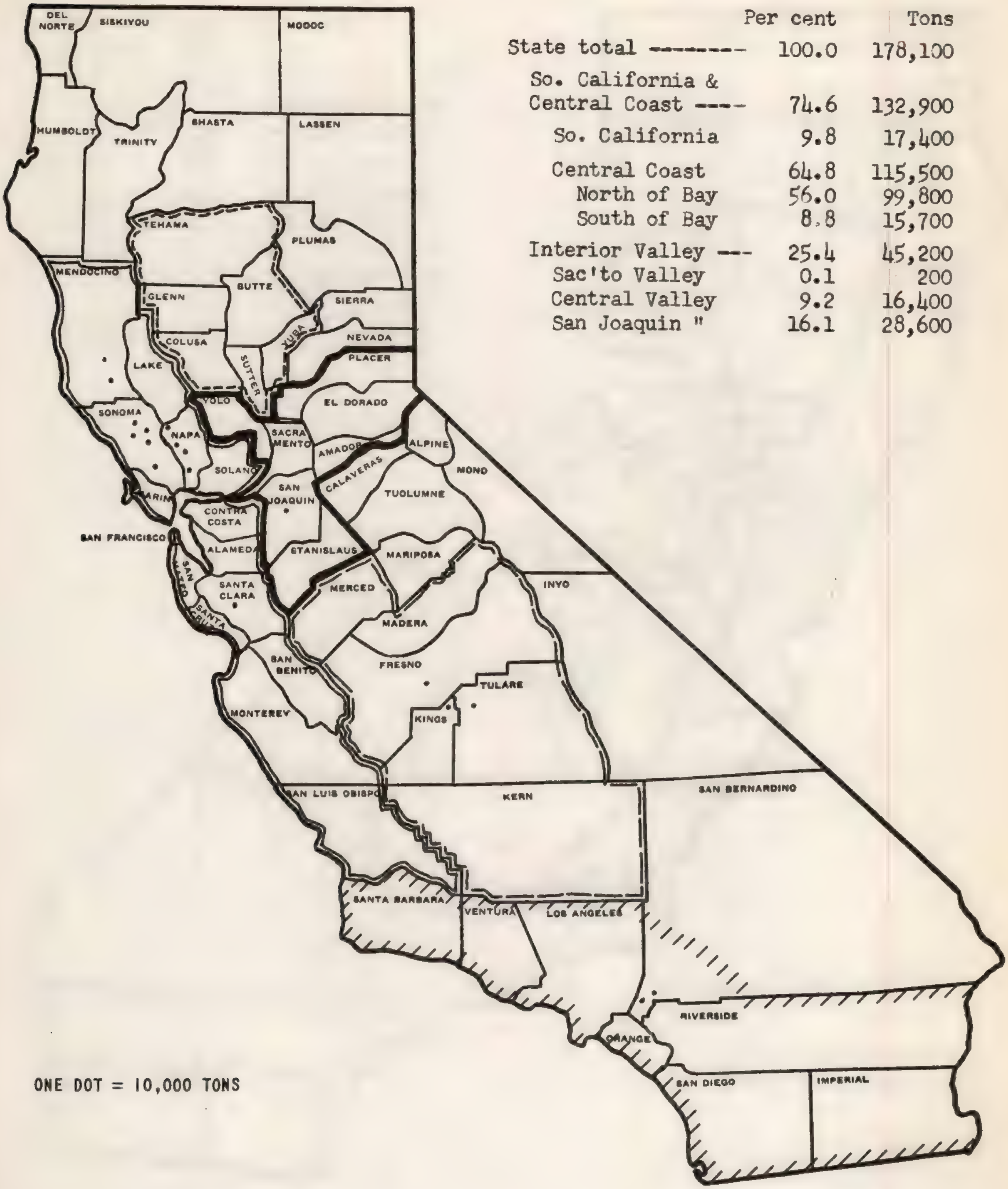
Map 14. Equivalent Grape Tonnage Used in Dessert Wine Production, 1948

	Per cent	Tons
State total --------	100.0	1,168,200
So. California & Central Coast ----	8.0	93,200
So. California	4.7	54,700
Central Coast	3.3	38,500
North of Bay	1.8	20,700
South of Bay	1.5	17,800
Interior Valley ▬	92.0	1,075,000
Sac'to Valley	0.0	0
Central Valley	31.5	367,600
San Joaquin "	60.5	707,400



Map 15. Equivalent Grape Tonnage Used in Total Table Wine Production, 1948

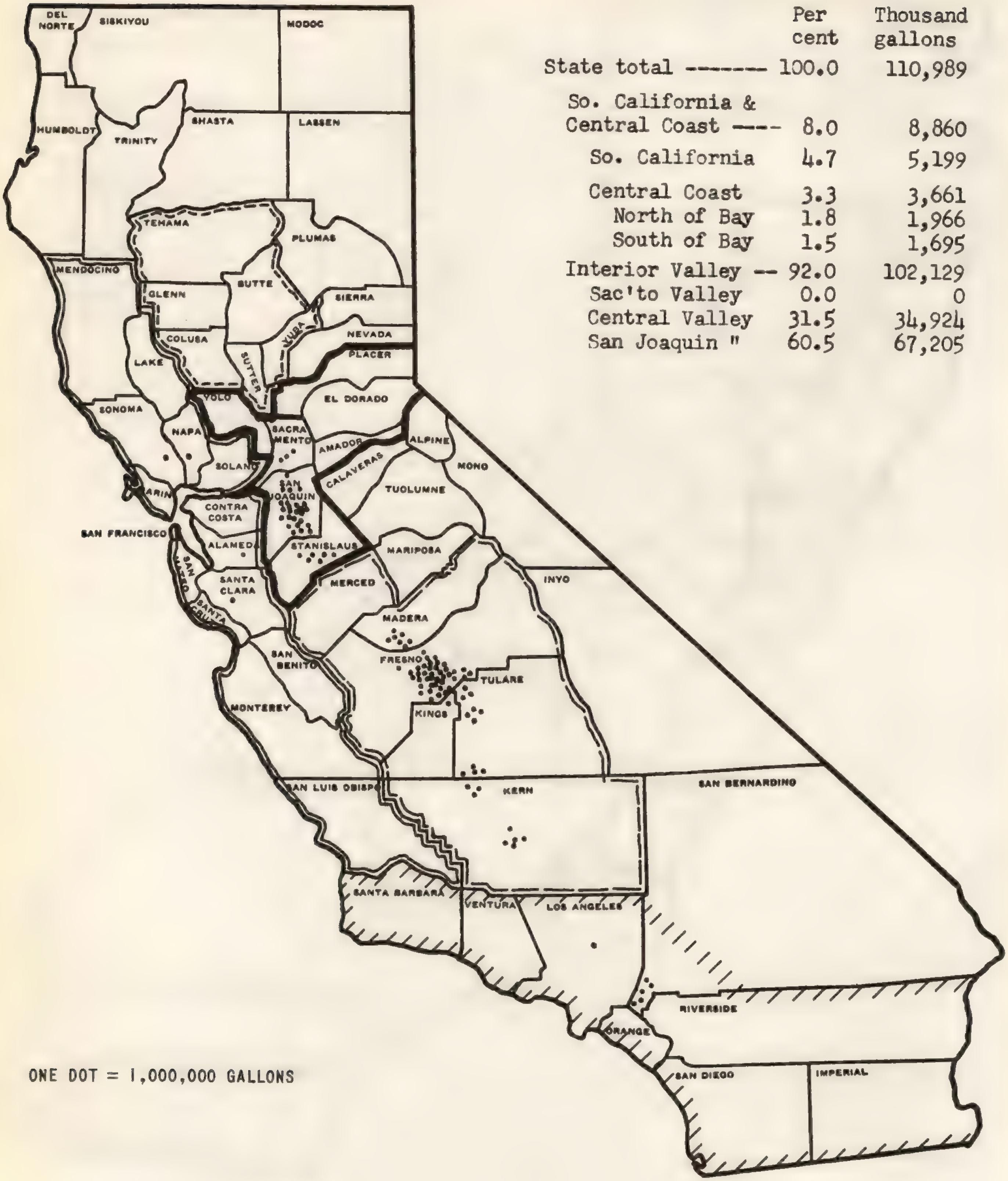
	Per cent	Tons
State total --------	100.0	178,100
So. California & Central Coast ----	74.6	132,900
So. California	9.8	17,400
Central Coast	64.8	115,500
North of Bay	56.0	99,800
South of Bay	8.8	15,700
Interior Valley ---	25.4	45,200
Sac'to Valley	0.1	200
Central Valley	9.2	16,400
San Joaquin "	16.1	28,600



ONE DOT = 10,000 TONS

Map 16. Gross Dessert Wine Production, 1948

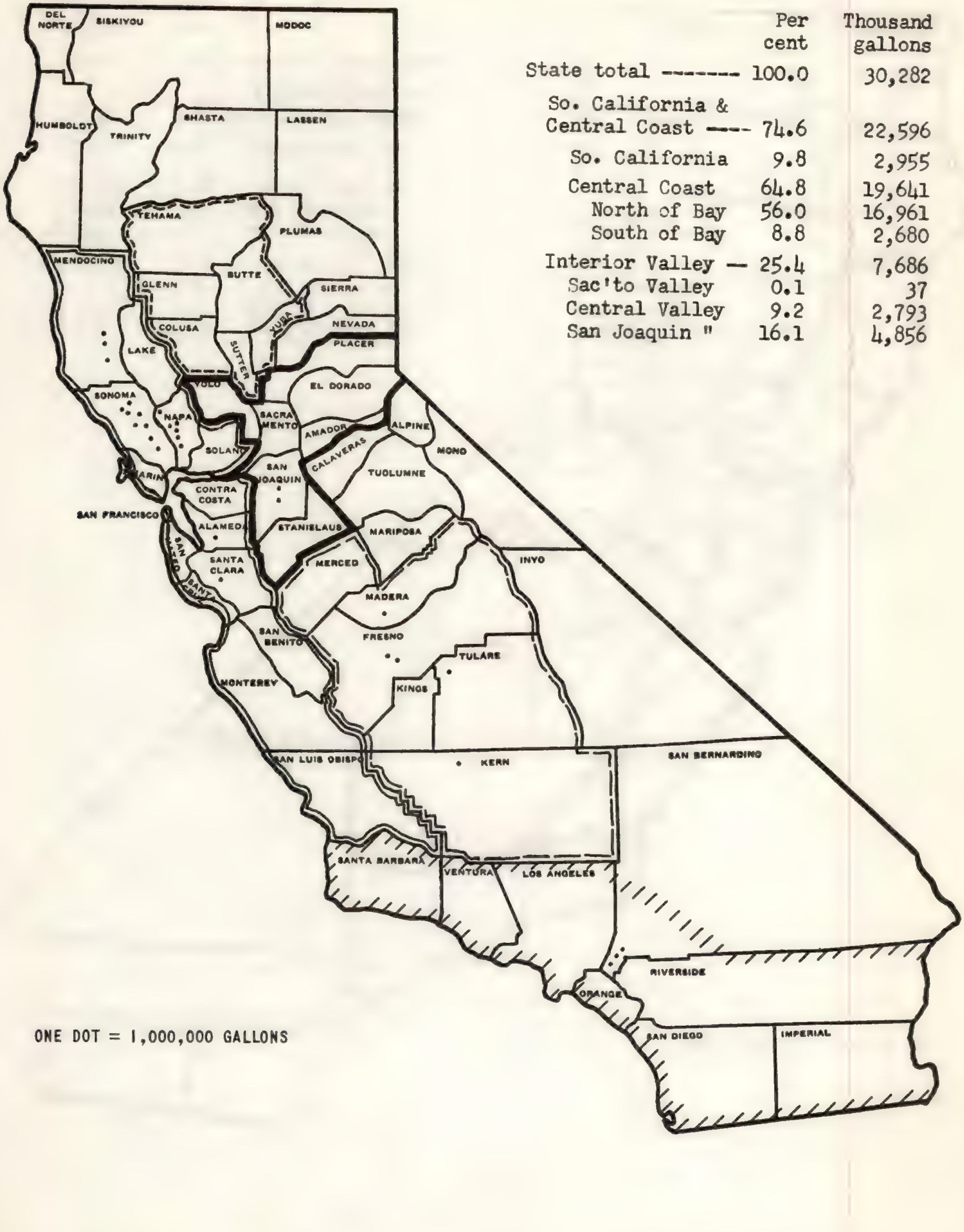
	Per cent	Thousand gallons
State total -------	100.0	110,989
So. California & Central Coast ----	8.0	8,860
So. California	4.7	5,199
Central Coast	3.3	3,661
North of Bay	1.8	1,966
South of Bay	1.5	1,695
Interior Valley --	92.0	102,129
Sac'to Valley	0.0	0
Central Valley	31.5	34,924
San Joaquin "	60.5	67,205



ONE DOT = 1,000,000 GALLONS

Map 17. Gross Total Table Wine Production, 1948

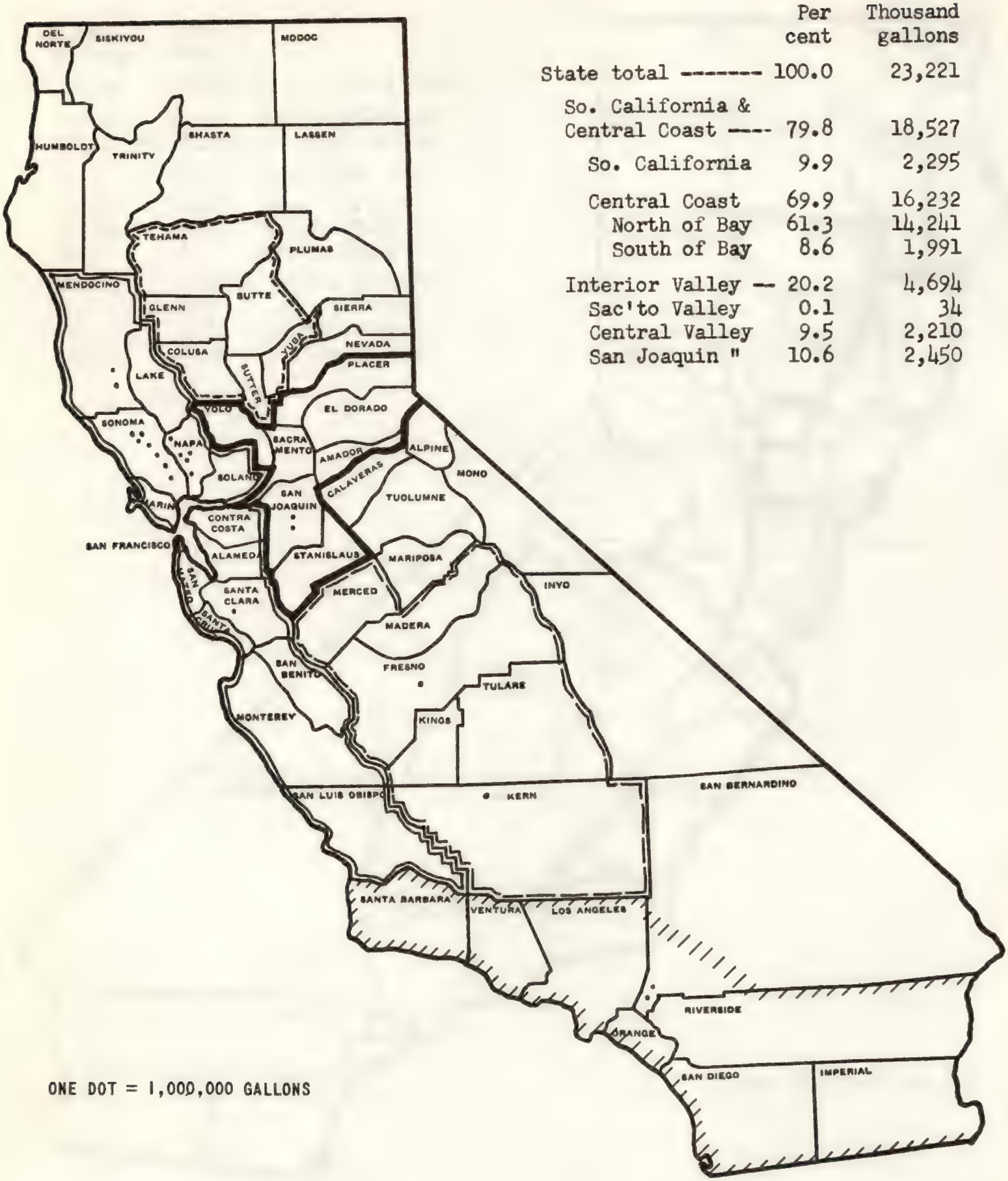
	Per cent	Thousand gallons
State total -------	100.0	30,282
So. California & Central Coast ----	74.6	22,596
So. California	9.8	2,955
Central Coast	64.8	19,641
North of Bay	56.0	16,961
South of Bay	8.8	2,680
Interior Valley —	25.4	7,686
Sac'to Valley	0.1	37
Central Valley	9.2	2,793
San Joaquin "	16.1	4,856



ONE DOT = 1,000,000 GALLONS

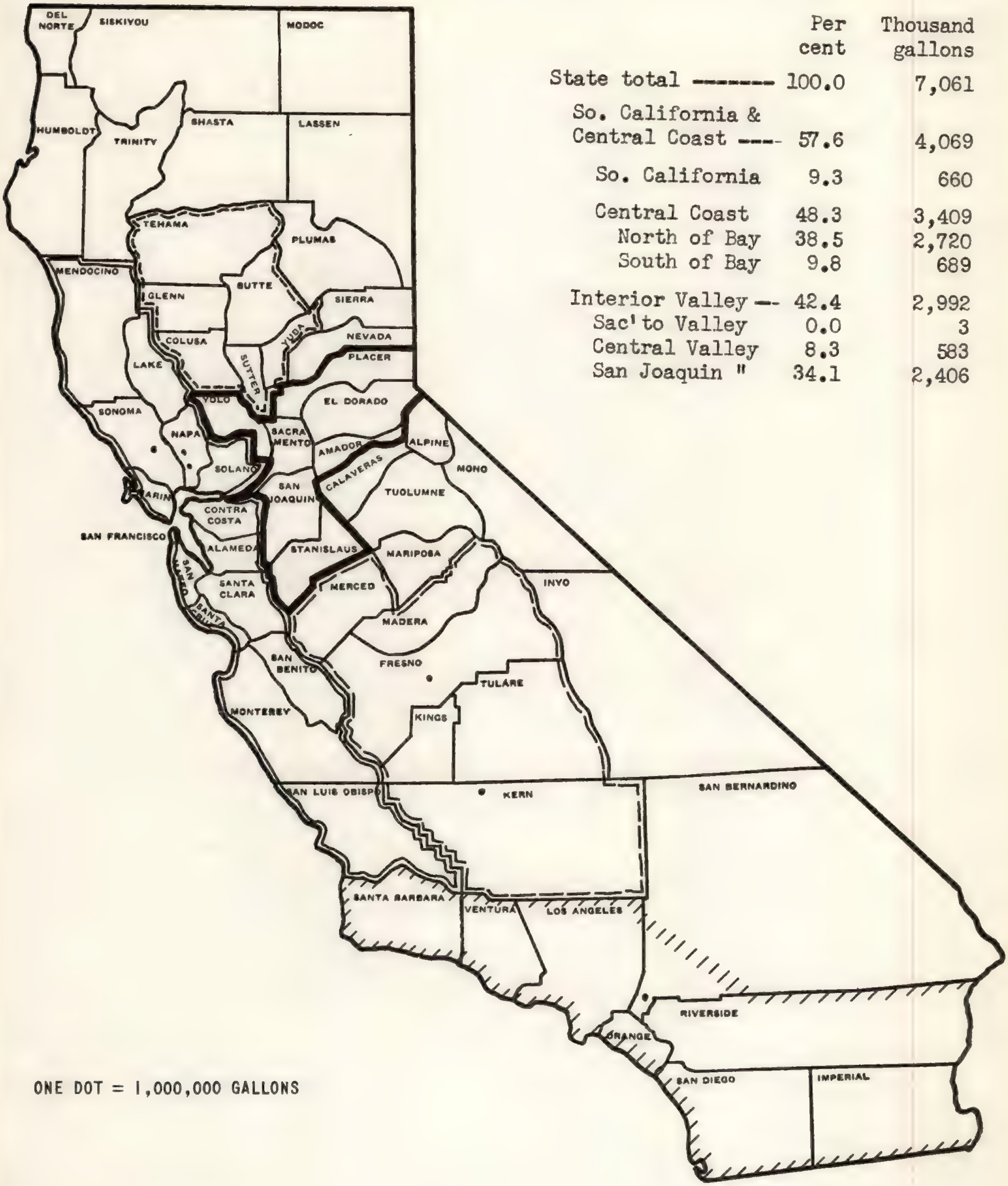
Map 18. Gross Red Table Wine Production, 1948

	Per cent	Thousand gallons
State total -------	100.0	23,221
So. California & Central Coast ----	79.8	18,527
So. California	9.9	2,295
Central Coast	69.9	16,232
North of Bay	61.3	14,241
South of Bay	8.6	1,991
Interior Valley --	20.2	4,694
Sac'to Valley	0.1	34
Central Valley	9.5	2,210
San Joaquin "	10.6	2,450



ONE DOT = 1,000,000 GALLONS

Map 19. Gross White Table Wine Production, 1948



	Per cent	Thousand gallons
State total --------	100.0	7,061
So. California & Central Coast ----	57.6	4,069
So. California	9.3	660
Central Coast	48.3	3,409
North of Bay	38.5	2,720
South of Bay	9.8	689
Interior Valley --	42.4	2,992
Sac'to Valley	0.0	3
Central Valley	8.3	583
San Joaquin "	34.1	2,406

ONE DOT = 1,000,000 GALLONS

University of California
College of Agriculture
Agricultural Experiment Station
Berkeley, California

Economic Situation and Market Organization in the California Grape Industries

by

George L. Mehren

Appendix C

Grape Industry Statistics
as of May, 1950

compiled by

S. W. Shear

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May, 1950

Contribution from the
Giannini Foundation of Agricultural Economics
Mimeographed Report No. 107

APPENDIX TABLE I
CALIFORNIA BEARING GRAPE ACREAGE BY VARIETAL CLASSES
1919 - 1949

Crop Year	Total	Varietal Class[a]		
		Wine	Table	Raisin
	1	2	3	4
	Bearing Acres			
1919	291,600	95,500	53,500	142,600
1920	307,600	98,500	56,700	152,400
1921	331,900	102,400	61,000	168,500
1922	363,600	108,300	66,300	189,000
1923	409,500	117,100	74,800	217,600
1924	469,600	126,900	90,900	251,800
1925	527,300	139,700	108,200	279,400
1926	564,800	155,400	117,100	292,300
1927	579,000	170,000	119,800	289,200
1928	577,200	179,800	116,400	281,000
1929	565,700	187,600	111,300	266,800
1930	546,300	187,800	103,800	254,700
1931	527,200	183,800	96,600	246,800
1932	515,100	182,000	92,100	241,000
1933	497,800	176,000	86,800	235,000
1934	487,900	173,100	82,900	231,900
1935	479,200	168,700	80,000	230,500
1936	473,200	165,500	78,100	229,600
1937	481,200	167,000	78,600	235,600
1938	485,000	167,300	78,900	238,800
1939	483,600	166,100	78,300	239,200
1940	481,900	164,400	78,400	239,100
1941	487,300	164,900	79,600	242,800
1942	489,700	165,100	79,500	245,100
1943	490,400	165,200	79,400	245,800
1944	490,700	163,200	80,000	247,500
1945	493,000	165,100	79,800	248,100
1946	493,500	165,300	79,500	248,700
1947	500,000	169,000	81,100	249,900
1948	497,900	175,100	84,700	238,000
1949[b]	489,600	167,800	90,100	231,700

[a] Chief varieties included in each class by the Crop Reporting Service according to the most usual use for each variety are:

Raisin: Thompson Seedless, Muscat, Sultana, and Currant.
Table: Tokay, Malaga, Emperor, Red Malaga, Cornichon, Almeria, Ribier.
Wine: Zinfandel, Alicante Bouschet, Carignane, Petite Sirah, Mission, Mataro, and several minor black and white varieties.

[b] Preliminary estimates for 1949.

Source: Compiled by S. W. Shear, Giannini Foundation of Agricultural Economics, University of California, March 1950, from U.S.D.A., B.A.E., Fruit and Nuts, Bearing Acreage 1919-1946, and California Crop Reporting Service, Acreage Estimates California Fruit and Nut Crops, annual reports for 1947 and 1948 and preliminary estimates for 1949 of June 1950.

APPENDIX TABLE 2
CALIFORNIA NON-BEARING GRAPE ACREAGE BY VARIETAL CLASSES
1919 - 1948

Crop Year	Total	Varietal Class[a]		
		Wine	Table	Raisin
	1	2	3	4
	Acres Not In Bearing			
1919	69,800	13,800	13,100	42,900
1920	103,700	19,900	18,300	65,500
1921	140,700	27,100	30,200	83,400
1922	167,400	33,700	42,400	91,300
1923	163,700	40,900	44,400	78,400
1924	129,100	45,600	33,800	49,700
1925	89,400	43,900	19,800	25,700
1926	62,000	38,000	11,300	12,700
1927	45,700	29,300	7,600	8,800
1928	33,600	22,000	5,500	6,100
1929	26,100	16,600	4,400	5,100
1930	20,800	12,300	3,800	4,700
1931	18,900	10,700	3,000	5,200
1932	18,700	8,800	2,600	7,300
1933	22,100	9,000	2,500	10,600
1934	28,500	10,200	2,800	15,500
1935	31,500	10,800	3,400	17,300
1936	29,200	9,500	3,800	15,900
1937	24,300	7,600	4,600	12,100
1938	25,000	6,400	5,800	12,800
1939	27,500	6,100	6,200	15,200
1940	27,100	5,900	5,300	15,900
1941	22,700	5,600	4,100	13,000
1942	20,000	6,400	3,600	10,000
1943	18,000	6,800	3,200	8,000
1944	21,800	9,600	3,900	8,300
1945	38,400	18,100	8,300	12,000
1946	49,500	21,300	11,500	16,700
1947	57,800	22,500	13,600	21,700
1948	41,900	13,800	9,700	18,400

[a] The chief varieties included in each class by the Crop Reporting Service in accordanse with the most usual use for each variety are:

Raisin: Thompson Seedless, Muscat, Sultana, and Zante Currant.
Table: Tokay, Malaga, Emperor, Red Malaga, Cornichon, Almeria, Ribier.
Wine: Zinfandel, Alicante Bouschet, Carignane, Petite Sirah, Mission, Mataro, and several minor black and white varieties.

Source: Compiled by S. W. Shear, Giannini Foundation of Agricultural Economics, University of California, March 1950, from estimates of the California Crop Reporting Service.

APPENDIX TABLE 3
CALIFORNIA GRAPE ACREAGE BY VARIETAL CLASSES AND FOR WINE VARIETIES
BY DISTRICTS, 1948

Variety	State total	Interior Valley a/					Central Coast	Southern California a/		
		Total	San Joaquin and Central	San Joaquin Valley	Central Valley	Sacramento Valley		Total	Dessert b/	Non-dessert
	1	2(3+6)	3(4+5)	4	5	6	7	8(9+10)	9	10
		Acres, bearing and non-bearing								
All varieties	539,821	421,937	416,080	328,285	87,795	5,857	59,648	58,236	8,894	49,342
Table varieties	94,417	89,059	88,461	60,566	27,895	598	694	4,664	730	3,934
Raisin varieties	256,465	242,189	241,404	232,000	9,404	785	361	13,915	8,164	5,751
Muscat	46,256	41,175	40,966	40,538	428	209	332	4,749	0	4,749
Wine varieties	188,939	90,689	86,215	35,719	50,496	4,474	58,593	39,657	0	39,657
Wine total	188,939	90,689	86,215	35,719	50,496	4,474	58,593	39,657	0	39,657
Red total	162,875	80,996	76,616	29,299	47,317	4,380	47,344	34,535	0	34,535
Zinfandel	47,624	21,785	20,297	2,845	17,452	1,488	17,269	8,570	0	8,570
Carignane	36,597	22,767	22,441	8,586	13,855	326	11,104	2,726	0	2,726
Alicante B	25,199	18,865	18,375	8,391	9,984	490	3,077	3,257	0	3,257
Mission	13,874	5,508	4,912	1,832	3,080	596	726	7,640	0	7,640
Mataro	7,463	1,778	530	221	309	1,248	1,812	3,873	0	3,873
Petite Sirah	6,046	1,285	1,254	426	828	31	4,723	38	0	38
Grenache	8,480	4,108	4,089	3,329	760	19	643	3,729	0	3,729
Others	17,592	4,900	4,718	3,669	1,049	182	7,990	4,702	0	4,702
White total	26,064	9,693	9,599	6,420	3,179	94	11,249	5,122	0	5,122
G. Chasselas c/	8,453	4,001	3,971	2,394	1,577	30	2,377	2,075	0	2,075
Burger	3,578	1,542	1,542	739	803	0	769	1,267	0	1,267
Colombar c/	1,463	95	93	17	76	2	1,362	6	0	6
F. Riesling c/	777	43	43	33	10	0	727	7	0	7
Others	11,793	4,012	3,950	3,237	713	62	6,014	1,767	0	1,767

a/ For Counties included in each district see footnote to acreage, table 4.

b/ Imperial and Riverside counties plus unofficial estimates for Borega Valley in San Diego County, assuming no Muscat or wine varieties grown in dessert valleys.

c/ Varietal names are those used by the California Crop Reporting Service in the source quoted and differ from the names preferred and used by the Viticulture Division of the University as follows: Palomino preferred to Golden Chasselas, Savignon Vert to Colombar and Sylvaner to Franklin Riesling.

Source: Compiled by S. W. Shear, Giannini Foundation of Agricultural Economics University of California March 1950 from California Crop Reporting Service, unpublished county acreage estimates by varieties comparable to published county acreage by varietal classes in Acreage Estimates, California Fruit and Nut Crops as of 1948.

APPENDIX TABLE 4
CALIFORNIA BEARING GRAPE ACREAGE BY VARIETAL CLASSES AND DISTRICTS
1923 - 1948

Year	All Varieties	Wine Varieties [a]					
	State total [b]	Central Coast	Southern California	Sacramento Valley	Central Valley	San Joaquin Valley	Central Coast
	1	2	3	4	5	6	7
	Bearing Acres						
1923	434,371	45,428	20,647	2,026	28,975	17,701	400
1924	516,698	48,890	21,209	1,126	33,125	18,900	565
1925	597,592	53,869	24,455	1,448	37,732	21,694	680
1926	646,761	57,659	30,377	1,869	41,670	26,482	800
1927	635,464	60,408	27,464	1,984	48,183	30,080	617
1928	627,955	62,289	27,657	3,007	56,540	32,108	615
1929	606,843	62,230	28,810	4,420	64,366	33,721	650
1930	549,862	61,322	27,636	4,273	65,138	32,271	558
1931	530,758	58,488	27,344	4,033	65,227	31,522	586
1932	525,040	59,059	29,215	3,910	62,566	31,310	586
1933	504,552	59,049	34,690	2,438	58,276	27,078	576
1934	499,186	59,063	34,576	2,470	58,008	26,487	580
1935	485,714	57,594	30,715	1,695	56,054	25,460	984
1936	469,525	56,079	28,070	1,158	53,449	24,279	879
1937	481,689	57,853	29,364	1,143	54,057	24,506	902
1938	487,453	59,407	30,105	1,030	54,166	24,174	844
1939	488,428	59,824	30,278	816	53,871	23,464	819
1940	482,345	60,001	26,254	529	53,510	23,165	922
1941	486,291	60,472	29,979	571	51,282	22,808	823
1942	489,747	60,855	30,251	566	50,786	22,717	858
1943	489,297	60,883	30,549	566	50,721	22,654	847
1944	490,289	61,442	28,354	557	51,088	23,006	847
1945	493,263	61,690	29,515	557	51,342	23,706	844
1946	495,276	62,035	28,679	554	50,810	23,936	784
1947[c]	500,051	60,818	29,985	540	50,999	25,769	642
1948[c]	497,889	55,094	38,007	531	52,097	28,503	606

(Continued)

APPENDIX TABLE 4 (Cont d)
CALIFORNIA BEARING GRAPE ACREAGE BY VARIETAL CLASSES AND DISTRICTS
1923 - 1948

Table Varieties a/				Raisin Varieties a/				
Southern California	Sacramento Valley	Central Valley	San Joaquin Valley	Central Coast	Southern California	Sacramento Valley	Central Valley	San Joaquin Valley
8	9	10	11	12	13	14	15	16
				Bearing Acres				
3,606	310	36,353	36,420	—	6,065	8,800	4,350	222,960
5,007	523	39,055	50,028	—	8,342	9,533	6,800	272,155
8,513	795	48,011	64,149	4	12,329	11,880	12,760	298,327
11,152	976	54,853	71,918	4	15,816	11,908	13,541	305,888
12,976	709	42,169	75,137	110	10,198	12,993	9,805	301,120
12,783	752	41,179	69,618	108	10,120	13,098	8,920	287,582
10,911	848	39,102	64,810	105	9,947	13,161	8,615	263,611
10,599	695	37,937	59,616	105	8,873	7,593	8,662	223,271
8,614	404	36,112	53,928	105	8,543	6,299	8,191	219,939
7,977	410	35,130	53,140	105	7,695	6,029	7,876	218,607
7,365	383	32,272	48,035	105	5,562	4,133	7,507	215,748
7,185	386	31,289	47,539	105	5,555	4,117	7,507	212,986
5,570	338	29,537	47,228	403	7,387	2,847	7,484	211,173
4,234	285	28,712	43,420	430	9,416	1,844	7,378	208,831
4,407	288	29,156	44,270	440	10,119	1,755	7,644	214,676
4,402	286	29,007	44,614	428	10,395	1,729	8,057	217,693
4,390	272	29,002	44,530	404	10,781	1,637	8,272	218,912
4,799	191	28,507	44,702	393	10,494	719	8,593	218,403
4,295	191	27,540	45,964	307	9,729	720	8,635	221,821
4,300	178	26,789	46,872	296	9,602	703	8,641	225,180
4,176	178	26,728	46,714	296	9,505	716	8,650	225,004
4,083	184	27,139	47,139	296	8,991	711	8,698	226,639
4,076	178	26,519	48,040	294	9,218	711	8,814	227,018
3,933	177	26,835	47,343	320	10,624	713	8,960	227,931
3,936	161	27,292	48,935	331	10,940	628	8,984	228,957
4,415	159	27,517	51,914	296	10,222	568	9,128	217,718

a/ See footnotes to acreage tables 1 and 2 for varieties included in each class and table 4 for counties included in each district.

b/ State total exceeds the sum of district totals as acreage of a few minor counties were omitted from district totals given.

c/ Actual acreage changes from preliminary 1947 data to 1948 are not so great as indicated in several instances for a few counties because 1948 data are based on more complete survey than 1947 data for which comparable revisions have not yet been made.

Source: Compiled by S. W. Shear, Giannini Foundation of Agricultural Economics, University of California, March 1950, from published estimates of the California Crop and Livestock Reporting Service, subject to revision in recent years.

APPENDIX TABLE 5

CALIFORNIA BEARING GRAPE ACREAGE BY DISTRICTS AND VARIETAL CLASSES

1923 - 1948

Year	State[a]	Central Coast[b]				Southern California[b]				Sacramento Valley[b]			
	All	All	Raisin[c]	Table[c]	Wine[c]	All	Raisin	Table	Wine	All	Raisin	Table	Wine
	1	2	3	4	5	6	7	8	9	10	11	12	13
	Bearing Acres												
1923	434,371	45,828	-	400	45,428	30,318	6,065	3,606	20,647	10,136	8,800	310	2,026
1924	516,698	49,455	-	565	48,890	34,558	8,342	5,007	21,209	11,182	9,533	523	1,126
1925	597,592	54,553	4	680	53,869	45,297	12,329	8,513	24,455	13,431	11,880	795	1,448
1926	646,761	58,463	4	800	57,659	57,345	15,816	11,152	30,377	14,753	11,908	976	1,869
1927	635,464	61,135	110	617	60,408	50,638	10,198	12,976	27,464	15,586	12,993	709	1,984
1928	627,955	63,012	108	615	62,289	50,560	10,120	12,783	27,657	16,857	13,098	752	3,007
1929	606,843	62,985	105	650	62,230	49,668	9,947	10,911	28,810	18,419	13,161	848	4,420
1930	549,862	61,985	105	558	61,322	47,108	8,873	10,599	27,636	12,461	7,593	695	4,273
1931	530,758	59,179	105	586	58,488	44,501	8,543	8,614	27,344	10,736	6,299	404	4,033
1932	525,040	59,750	105	586	59,059	44,887	7,695	7,977	29,215	10,349	6,029	410	3,910
1933	504,552	59,730	105	576	59,049	47,617	5,562	7,365	34,690	6,954	4,133	383	2,438
1934	499,186	59,748	105	580	59,063	47,316	5,555	7,185	34,576	6,973	4,117	386	2,470
1935	485,714	58,981	403	984	57,594	43,672	7,387	5,570	30,715	5,880	2,847	338	1,695
1936	469,525	57,388	430	879	56,079	41,720	9,416	4,234	28,070	3,287	1,844	285	1,158
1937	481,689	59,195	440	902	57,853	43,890	10,119	4,407	29,364	3,186	1,755	288	1,143
1938	487,453	60,679	428	844	59,407	44,902	10,395	4,402	30,105	3,054	1,729	286	1,030
1939	488,428	61,047	404	819	59,824	45,449	10,781	4,390	30,278	2,725	1,637	272	816
1940	482,345	61,316	393	922	60,001	41,547	10,494	4,799	26,254	1,439	719	191	529
1941	486,291	61,602	307	823	60,472	44,003	9,729	4,295	29,979	1,482	720	191	571
1942	489,747	62,009	296	858	60,855	44,153	9,602	4,300	30,251	1,447	703	178	566
1943	489,297	62,025	296	847	60,883	44,230	9,505	4,176	30,549	1,460	716	178	566
1944	490,289	62,584	296	847	61,442	41,437	8,991	4,083	28,354	1,446	711	184	557
1945	493,263	62,827	294	844	61,690	42,809	9,218	4,076	29,515	1,446	711	178	557
1946	495,276	63,139	320	784	62,035	43,236	10,624	3,933	28,679	1,444	713	177	554
1947[c]	500,051	61,791	331	642	60,818	44,861	10,940	3,936	29,985	1,329	628	161	540
1948[c]	497,889	55,996	296	606	55,094	52,644	10,222	4,415	38,007	1,258	568	159	531

[a] State total exceeds the sum of district totals as acreage of a few minor counties omitted from district totals given.

[b] Counties included in each district:

Central Coast--Mendocino Lake, Sonoma, Napa, Marin, Contra Costa, Alameda, Santa Clara, San Mateo, Santa Cruz, San Benito, Monterey, San Luis Obispo.

Southern California--Santa Barbara, Ventura, Los Angeles, Orange, San Bernardino, Riverside, San Diego, Imperial.

San Joaquin Valley--Merced, Madera, Fresno, Kings, Tulare, Kern.

Sacramento Valley--Yuba, Sutter, Colusa, Butte, Glenn, Tehema.

Central Valley--Amador, El Dorado, Placer, Yolo, Solano, Sacramento, San Joaquin, Stanislaus.

[c] See preceding acreage tables, 1 and 2 for varieties included in each class.

[d] Actual acreage changes from preliminary 1947 data to 1948 are not so great as indicated in several instances for a few counties because 1948 data are based on a more complete survey than 1947 data for which comparable revisions have not yet been made.

Source: Compiled by S. W. Shear, Giannini Foundation of Agricultural Economics, University of California, March 1950, from published estimates of the California Crop and Livestock Reporting Service, subject to revision in recent years.

(Continued)

APPENDIX TABLE 5 (Cont'd)

CALIFORNIA BEARING GRAPE ACREAGE BY DISTRICTS AND VARIETAL CLASSES

1923 - 1948

Central Valley[b]				San Joaquin Valley[b]			
All 14	Raisin 15	Table 16	Wine 17	All 18	Raisin 19	Table 20	Wine 21
Bearing Acres							
69,678	4,350	36,353	28,975	277,081	222,960	36,420	17,701
78,980	6,800	39,055	33,125	341,083	272,155	50,028	18,900
98,503	12,760	48,011	37,732	384,170	298,327	64,149	21,694
110,064	13,541	54,853	41,670	404,288	305,888	71,918	26,482
100,157	9,805	42,169	48,183	406,337	301,120	75,137	30,080
106,639	8,920	41,179	56,540	389,308	287,582	69,618	32,108
112,083	8,615	39,102	64,366	362,142	263,611	64,810	33,721
111,737	8,662	37,937	65,138	315,158	223,271	59,616	32,271
109,530	8,191	36,112	65,227	305,389	219,939	53,928	31,522
105,572	7,876	35,130	62,566	303,057	218,607	53,140	31,310
98,055	7,507	32,272	58,276	290,861	215,748	48,035	27,078
96,804	7,507	31,289	58,008	287,012	212,986	47,539	26,487
93,075	7,484	29,537	56,054	283,861	211,173	47,228	25,460
89,539	7,378	28,712	53,449	276,530	208,831	43,420	24,279
90,857	7,644	29,156	54,057	283,452	214,676	44,270	24,506
91,230	8,057	29,007	54,166	286,481	217,693	44,614	24,174
91,145	8,272	29,002	53,871	286,906	218,912	44,530	23,464
90,610	8,593	28,507	53,510	286,270	218,403	44,702	23,165
87,457	8,635	27,540	51,282	290,593	221,821	45,964	22,808
86,216	8,641	26,789	50,786	294,769	225,180	46,872	22,717
86,099	8,650	26,728	50,721	294,372	225,004	46,714	22,654
86,917	8,698	27,139	51,088	296,784	226,639	47,139	23,006
86,675	8,814	26,519	51,342	298,383	227,018	48,040	23,706
86,605	8,960	26,835	50,810	299,729	227,931	47,343	23,936
87,275	8,984	27,292	50,999	303,681	228,957	48,935	25,769
88,742	9,128	27,517	52,097	298,135	217,718	51,914	28,503

See footnotes on preceding page.

APPENDIX TABLE 6
CALIFORNIA GRAPE ACREAGE BY VARIETAL CLASSES AND FOR WINE VARIETIES PER CENT EACH VARIETY OF ALL VARIETIES
BY DISTRICTS, 1948

	State Total	Interior Valley[a]					Central Coast	Southern California[a]		
		Total	San Joaquin & Central Valley	San Joaquin	Central Valley	Sacramento Valley		Total	Desert[b]	Non-Desert
	1	2 (3+6)	3 (4+5)	4	5	6	7	8 (9+10)	9	10
	Per Cent of District Total Acres of All Varieties, Bearing and Non-Bearing									
All Varieties	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Table Varieties	17.5	21.1	21.3	18.4	31.8	10.2	1.2	8.0	8.2	8.0
Raisin Varieties	47.5	57.4	58.0	70.7	10.7	13.4	0.6	23.9	91.8	11.7
Muscat	8.5	9.8	9.8	12.3	0.5	3.6	0.5	8.2	0	9.6
Wine Varieties	35.0	21.5	20.7	10.9	57.5	76.4	98.2	68.1	0	80.3
Wine, Total	35.0	21.5	20.7	10.9	57.5	76.4	98.2	68.1	0	80.3
Red, Total	30.2	19.2	18.4	8.9	53.9	74.8	79.3	59.3	0	70.0
Zinfandel	8.8	5.2	4.9	0.9	19.9	25.4	+28.9	14.7	0	17.4
Carignane	6.8	5.4	5.4	2.5	15.8	5.5	18.6	4.7	0	5.5
Alicante Bouschet	4.7	4.5	4.4	+2.5	11.4	8.4	5.2	5.5	0	6.6
Mission	2.6	1.3	1.2	0.6	3.5	10.2	1.2	13.1	0	15.5
Mataro	1.4	0.4	0.1	0.1	+0.3	21.3	3.0	+ 6.6	0	7.8
Petite Sirah	1.1	0.3	0.3	0.1	0.9	0.5	7.9	0.1	0	0.1
Grenache	1.6	1.0	1.0	1.0	0.9	0.3	1.1	6.4	0	7.5
Others	- 3.2	+ 1.1	1.1	1.1	1.2	3.1	13.4	8.1	0	9.5
White, Total	4.8	2.3	2.3	2.0	3.6	1.6	18.9	8.8	0	10.3
G. Chasselas[c]	1.6	0.9	1.0	- 0.8	1.8	0.5	4.0	3.6	0	4.2
Burger	+ 0.6	0.4	0.4	0.2	0.9	0	1.3	2.2	0	2.6
Colombar[c]	0.3	d/	d/	d/	0.1	d/	2.3	d/	0	d/
F. Riesling[c]	0.1	d/	d/	d/	d/	0	1.2	d/	0	d/
Others	2.2	1.0	0.9	1.0	0.8	1.1	10.1	3.0	0	3.5

[a] For counties included in each district see footnote to acreage table 4.

[b] Imperial and Riverside counties plus unofficial estimates for Borega Valley in San Diego County, assuming no Muscat or wine varieties grown in desert valleys.

[c] Varietal names are those used by the California Crop Reporting Service and differ from the names preferred to Golden Chasselas, Sauvigon vert to Colombar, and Sylvan to Franken Riesling.

[d] Less than one tenth of one per cent.

Source: Computed by S. W. Shear, Giannini Foundation of Agricultural Economics, University of California, March 1950, from total bearing and non-bearing acreage data from the California Crop Reporting Service in the preveding table 5.

APPENDIX TABLE 7
CALIFORNIA TOTAL WINE GRAPE ACREAGE BY VARIETIES, 1936-1948

Variety	1948	1947	1946	1945	1944	1943	1942	1941	1940	1939	1938	1937	1936
	1	2	3	4	5	6	7	8	9	10	11	12	13
	Total acres, Bearing and Non-bearing[a]												
Wine, total	188,939	191,477	187,797	184,664	174,194	172,360	170,580	170,866	169,358	174,994	175,593	174,607	171,575
Red, total	162,875	165,208	163,091	161,761	154,981	155,549	154,327	155,164	153,702	159,445	160,608	160,189	158,182
Zinfandel	47,624	48,323	49,583	51,047	50,349	51,099	51,109	51,347	51,637	53,307	53,741	53,898	53,343
Alicante B.	25,199	26,506	26,492	25,891	25,606	26,743	26,747	26,872	28,193	29,321	29,884	30,339	30,240
Mataro	7,463	6,883	7,400	7,696	7,692	7,729	7,771	7,780	7,578	8,143	8,247	8,228	7,977
P. Sirah	6,046	7,557	7,610	7,685	7,721	7,601	7,523	7,560	7,541	7,819	7,720	7,546	7,508
Mission	13,874	12,133	11,548	11,891	10,906	10,312	10,182	10,197	9,740	10,971	10,837	10,767	10,164
Grenache	8,480	7,348	6,472	6,093	4,229	3,646	3,507	3,474	3,002	3,269	3,213	2,995	2,980
Carignane	36,597	36,298	35,378	34,129	32,051	31,825	31,149	30,981	30,971	30,854	31,196	31,099	30,729
Other	17,592	20,160	18,608	17,329	16,747	16,594	16,339	16,953	15,040	15,761	15,770	15,317	15,241
White, total	26,064	26,269	24,706	22,903	18,893	16,811	16,253	15,702	15,656	15,549	14,985	14,418	13,393
G. Chasselas[b]	8,453	8,767	7,993	7,507	5,072	4,446	4,203	4,162	4,102	3,996	3,587	3,232	3,020
Burger	3,578	3,729	3,649	3,393	2,987	2,931	2,895	2,827	3,033	2,981	2,888	2,750	2,117
F. Riesling[b]	777	815	833	627	574	516	517	522	498	506	512	505	507
Colombar[b]	1,463	1,490	1,463	1,511	1,480	1,440	1,470	1,505	1,515	1,603	1,572	1,545	1,545
Other	11,793	11,468	10,868	9,865	8,780	7,478	7,168	6,686	6,508	6,463	6,426	6,286	6,204

a/ All data are preliminary and subject to revision.

b/ Varietal names are those used by the California Crop Reporting Service in the source quoted and differ from the names preferred and used by the Viticulture Division of the University as follows: Palomino preferred to Golden Chasselas, Savignon vert to Colombar, and Sylvaner to Franken Riesling.

Source: Compiled by S. W. Shear, Giannini Foundation of Agricultural Economics, University of California, March 1950, from annual issues of California Crop Reporting Service, Acreage Estimates of California Fruit and Nut Crops.

APPENDIX TABLE 8
CALIFORNIA WINE GRAPE ACREAGE PLANTED 1935 - 1948 AND STANDING IN 1948
BY YEAR PLANTED BY VARIETY

	Totals			Year Planted									
Variety[a]	1937 1948	1935 1939	1935 1948	1948	1947	1946	1945	1944	1943	1942	1941	1940	1939
	1	2	3	4	5	6	7	8	9	10	11	12	13
	Acres Planted in Years Indicated Still Standing in 1948												
Wine, Total	46,676	12,208	51,857	1,252	5,931	6,439	11,439	5,304	1,818	2,997	2,181	2,144	1,975
Red, Total	32,566	8,477	35,826	788	4,329	4,530	7,599	3,330	1,140	2,308	1,869	1,456	1,453
Zinfandel	5,250	2,583	6,342	130	552	518	761	322	296	236	553	391	410
Alicante B.	2,182	326	2,305	48	329	593	515	191	77	72	28	126	61
Mataro	407	268	512	0	0	53	0	18	0	6	142	25	32
P. Sirah	549	319	706	34	30	13	19	155	28	19	16	73	30
Mission	5,011	1,508	5,456	130	576	502	1,134	691	163	307	186	259	342
Grenache	5,702	681	5,815	107	937	647	2,002	443	57	795	44	102	134
Carignane	8,339	1,367	9,023	140	1,097	1,488	2,357	911	361	380	696	226	263
Other	5,026	1,425	5,667	199	808	716	811	599	158	493	204	254	181
White, Total	14,110	3,731	16,031	464	1,602	1,909	3,984	1,974	678	689	312	688	522
G. Chasselas[a]	5,777	1,431	6,507	179	579	997	2,053	629	64	189	97	289	200
Burger	1,461	481	1,615	1	117	204	406	71	149	116	22	48	111
F. Riesling[a]	404	121	495	10	106	74	52	67	12	25	20	8	0
Colombar[a]	388	171	535	37	81	50	49	70	53	16	0	8	17
Other	6,080	1,527	6,879	237	719	584	1,424	1,137	400	343	173	335	194

[a] Varietal names are those used by the California Crop Reporting Service in the source quoted and differ from the names preferred and used by the Viticulture Division of the University as follows: Palomino preferred to Golden Chasselas, Savigon vert to Colombar and Sylvaner to Franken Riesling.

Source: Compiled by S. W. Shear, Giannini Foundation of Agricultural Economics, University of California, March 1950, from California Crop Reporting Service, Acreage Estimates of California Fruit and Nut Crops as of 1948.

APPENDIX TABLE 9

CALIFORNIA TOTAL TABLE GRAPE ACREAGE BY VARIETIES

1936 - 1948

Year	Table, Total	Emperor	Tokay	Red Malaga	Ribier	White Malaga	Not Specified	Concord
	1	2	3	4	5	6	7	8
	Bearing and Non-Bearing Acres							
1936	81,424[a]	17,243	26,587	4,983	4,168	20,942	6,068	1,433
1937	83,139	18,107	27,186	5,131	4,253	20,999	6,143	1,320
1938	84,691	20,497	27,036	5,128	4,228	20,389	6,105	1,309
1939	85,019	21,505	27,050	5,197	4,229	19,651	6,086	1,301
1940	84,334	21,541	26,682	5,592	4,357	18,813	6,328	1,021
1941	82,284	21,491	26,290	5,280	4,312	17,810	6,184	967
1942	81,445	21,599	25,518	5,245	4,445	17,434	6,237	967
1943	81,575	22,420	25,497	5,172	4,528	16,825	6,169	964
1944	82,619	22,963	25,835	5,413	4,677	16,571	6,204	956
1945	86,801	25,962	26,132	5,722	5,219	16,510	6,291	965
1946	91,250	28,243	26,790	6,368	5,878	16,352	6,628	991
1947	94,670	30,547	27,017	7,130	6,296	16,101	6,615	964
1948	94,417	31,017	26,608	7,855	6,550	14,225	7,136	1,026
Per Cent Acreage of Each Variety of All Table Varieties [b]								
1937	16.6[b]	21.8	32.7	6.2	5.1	25.2	7.4	1.6
1946	16.8[b]	30.9	29.4	7.0	6.4	17.9	7.3	1.1
1947	17.0[b]	32.3	28.5	7.5	6.7	17.0	7.0	1.0
1948	17.5[b]	32.9	28.2	8.3	6.9	15.1	7.6	1.1
Percentage 1946 Acreage of 1937								
1946	109.8	156.0	98.5	124.1	138.2	77.9	107.9	75.1
1947	113.9	168.7	99.4	139.0	148.0	76.7	107.7	73.0
1948	113.6	171.3	97.9	153.1	154.0	67.7	116.2	77.7

[a] The 1937 report shows a total of 646 acres more of table varieties planted 1936 and earlier than the 1936 report, indicating underenumeration for 1936 of at least 646 acres.

[b] Except col. 1 is per cent total acreage of table varieties of all varieties.

Source: Compiled by S. W. Shear, Giannini Foundation of Agricultural Economics, University of California, Berkeley, March 1950, from the following sources: 1936 U. S. Dept. Agr., A.A.A., California Fruit and Nut Acreage Survey 1936, Stat. Bul. No. 1, Jan., 1938; 1937-1948 Calif. Crop and Livestock Reporting Service, Acreage Estimates Calif. Fruit and Nut Crops, annual issues.

APPENDIX TABLE 10

CALIFORNIA TABLE AND RAISIN GRAPE ACREAGE PLANTED, 1935-1948 AND STANDING IN 1948 BY YEARS PLANTED, BY VARIETY

Variety	Totals			Year Planted									
	1937 - 1948	1935 - 1939	1935 - 1948	1948	1947	1946	1945	1944	1943	1942	1941	1940	1939
	1	2	3	4	5	6	7	8	9	10	11	12	13
	Acres Planted in Years Shown and Still Standing in 1948[a]												
Table, Total	28,663	9,128	32,058	1,382	3,993	4,300	5,319	2,522	1,174	1,372	1,480	1,388	1,131
1. Except 11 & 12	27,928	8,641	30,917	1,311	3,938	4,138	5,138	2,434	1,141	1,356	1,443	1,357	1,116
2. Sum of 8,9,10,11	10,203	3,068	11,816	865	1,547	1,390	1,743	1,213	317	489	734	400	409
3. Sum of 8,9, & 10	9,656	2,688	10,961	845	1,498	1,293	1,589	1,725	297	486	764	376	395
4. Sum of 8,9, & 11	8,328	2,576	9,643	342	1,408	1,035	1,449	1,113	272	361	733	349	325
5. Sum of 8 & 9	7,781	2,196	8,738	322	1,359	938	1,295	1,025	252	358	718	325	311
6. Emperor	15,392	5,052	16,623	404	2,059	2,301	3,017	1,010	743	744	457	836	611
7. Ribier	2,880	901	3,333	62	381	544	552	299	101	126	222	145	110
8. Red Malaga	3,654	1,003	4,268	299	1,066	490	408	494	103	78	89	238	77
9. Tokay	4,127	1,193	4,520	23	293	448	887	531	149	280	629	87	234
10. Not Specified	1,875	492	2,173	523	139	355	294	100	45	128	46	51	84
11. White Malaga	547	380	855	20	49	97	154	88	20	3	20	24	14
12. Concord	188	107	286	51	6	65	7	-	13	13	17	7	1
Raisin, Total	58,567	25,625	69,208	2,998	8,332	7,111	7,179	4,281	2,911	3,043	2,928	4,800	3,820
1. Muscat	5,524	1,692	6,342	210	906	631	660	674	167	522	283	597	183
2. Other (1-2)	53,043	23,933	62,866	2,738	7,426	6,480	6,519	3,607	2,744	2,521	2,645	4,203	3,637
3. Thompson	51,036	22,570	60,143	2,661	7,325	6,376	6,373	3,397	2,460	2,425	2,519	4,047	3,529
4. Sultana	312	209	390	105	-	21	16	10	8	5	1	15	1
5. Other (6+7)	1,695	1,154	2,333	22	101	83	130	200	286	91	125	141	107
6. Current	984	869	1,482	22	90	70	59	28	70	68	100	106	69
7. Other	285	285	851	-	11	13	71	172	216	23	25	35	38

a/ Note: Plantings of raisin and table varieties shown as still standing in 1948 were approximately the same as original plantings 1935-1948 as almost none of these younger plantings had been pulled by 1948.

Source: Compiled by S. W. Shear, Giannini Foundation of Agricultural Economics, University of California, March 1950, from California Crop Reporting Service, Acreage Estimates California Fruit and Nut Crops as of 1948.

APPENDIX TABLE II

CALIFORNIA RAISIN AND TABLE GRAPE ACREAGE BY VARIETIES BY DISTRICTS, 1948

Variety and group	State Total	Interior Valley					Central Coast	Southern California		
		Total	San Joaquin & Central	San Joaquin Valley	Central Valley	Sacramento Valley		Total	Dessert Valley	Non-dessert
	1	2 (3+6)	3 (4+5)	4	5	6	7	8	9	10
	Acres, Bearing and Non-bearing Total									
Table, total	94,417	89,059	88,461	60,566	27,895	598	694	4,664	730	3,934
1. Except 11 & 12	79,166	73,340	74,927	48,019	26,908	413	604	3,222	423	2,799
2. Sum of 8,9,10,11	55,824	51,810	51,359	24,206	27,153	451	573	3,441	568	2,873
3. Sum of 8,9, & 10	41,599	38,463	38,112	11,915	26,197	351	532	2,604	286	2,318
4. Sum of 8,9, & 11	48,688	46,520	46,213	20,100	26,113	307	198	1,970	563	1,407
5. Sum of 8 & 9	34,463	33,173	32,966	7,809	25,157	207	157	1,133	281	852
6. Emperor	31,017	30,836	30,806	30,386	420	30	13	168	45	123
7. Ribier	6,550	6,041	6,009	5,718	291	32	59	450	92	358
8. Red Malaga	7,855	7,251	7,233	6,992	241	18	10	594	265	329
9. Tokay	26,608	25,922	25,733	817	24,916	189	147	539	16	523
10. Not Specified	7,136	5,290	5,146	4,106	1,040	144	375	1,471	5	1,466
11. White Malaga	14,225	13,347	13,247	12,291	956	100	41	837	282	555
12. Concord	1,026	372	287	256	31	85	49	605	25	580
Raisin, total	256,465	242,189	241,404	232,000	9,404	785	361	13,915	8,164	5,751
1. Muscat	46,256	41,175	40,966	40,538	428	209	332	4,749	88	4,661
2. Seedless, total	210,209	201,014	200,438	191,462	8,976	576	29	9,166	8,076	1,090
3. Except Currants	207,172	197,978	197,402	188,507	8,895	576	29	9,165	8,076	1,089
4. Thompson Seedless	198,758	190,548	190,000	181,159	8,841	548	23	8,187	8,059	128
5. Sultana	6,520	5,608	5,581	5,539	42	27	6	906	17	889
6. Currants	3,037	3,036	3,036	2,955	81	0	0	1	0	1
7. Other	1,894	1,822	1,821	1,809	12	1	0	72	0	72

a/ Imperial and Riverside counties plus unofficial estimates for Borega Valley in San Diego county assuming no Muscat or wine varieties grown in dessert valleys.

SOURCE: Compiled by S. W. Shear, Giannini Foundation of Agricultural Economics, University of California, March 1950, from California Crop Reporting Service, unpublished county acreage estimates by varieties comparable to published county data by varietal classes in acreage estimates, California Fruit and Nut Crops as of 1948.

APPENDIX TABLE 12
CALIFORNIA TOTAL RAISIN GRAPE ACREAGE BY VARIETIES, BY DISTRICTS
1936 — 1948

	Change 1936 to 1948		1948	1936	Change 1936 to 1948		1948	1936	Change 1936 to 1948		1948	1936
	1	2	3	4	5	6	7	8	9	10	11	12
	%	Acres bearing & Non-bearing			%	Acres bearing & Non-bearing			%	Acres bearing & Non-bearing		
	State Total				Central Coast				Southern California			
All raisin	+ 5.3	+ 12,965	256,465	243,500	- 36.2	- 205	361	566	+ 33.1	+ 3,464	13,915	10,451
Muscat	- 29.2	- 19,123	46,256	65,379	- 7.8	- 28	332	360	- 22.9	- 1,413	4,749	6,162
Other	+ 18.0	+ 32,088	210,209	178,121	- 85.9	- 177	29	206	+ 113.7	+ 4,877	9,166	4,289
Thompson Seedless	+ 21.6	+ 35,292	198,758	163,466	- 48.9	- 22	23	45	+ 143.7	+ 4,828	8,187	3,359
Sultana	- 41.2	- 4,561	6,520	11,081	- 53.8	- 7	6	13	+ 9.2	+ 76	906	830
Subtotal	+ 17.6	+ 30,731	205,278	174,547	- 50.0	- 29	29	58	+ 117.1	+ 4,904	9,093	4,189
Currant	+ 2.9	+ 85	3,037	2,952	- 100.0	- 82	0	82	- 66.7	- 2	1	3
Other	+ 204.5	+ 1,272	1,894	622	- 100.0	- 66	0	66	- 25.8	- 25	72	97
	Sacramento Valley				Central Valley				San Joaquin Valley			
All raisin	- 73.3	- 2,155	785	2,940	+ 28.9	+ 2,108	9,404	7,296	+ 4.4	+ 9,753	232,000	222,247
Muscat	- 45.9	- 177	209	386	- 19.1	- 101	428	529	- 30.0	- 17,404	40,538	57,942
Other	- 77.4	- 1,978	576	2,554	+ 32.6	+ 2,209	8,976	6,767	+ 16.5	+ 27,157	191,462	164,305
Thompson Seedless	- 70.1	- 1,285	548	1,833	+ 34.2	+ 2,255	8,841	6,586	+ 19.5	+ 29,516	181,159	151,643
Sultana	- 95.9	- 635	27	662	- 2.3	- 1	42	43	- 41.9	- 3,994	5,539	9,533
Subtotal	- 77.0	- 1,920	575	2,495	+ 34.0	+ 2,254	8,883	6,629	+ 15.8	+ 25,522	186,698	161,176
Currant	- 100.0	- 30	0	30	- 9.0	- 8	81	89	+ 7.5	+ 207	2,955	2,748
Other	- 96.6	- 28	1	29	- 75.5	- 37	12	49	+ 374.8	+ 1,428	1,809	381

Source: Compiled by S. W. Shear, Giannini Foundation of Agricultural Economics, University of California, March 1950, based on U. S. D. A., Agricultural Adjustment Administration, California Fruit and Nut Acreage Survey as of 1936 and California Crop Reporting Service unpublished county Acreage Estimates by varieties comparable to published county acreage by varietal classes in acreage estimates, California Fruit and Nut Crops as of 1948.

APPENDIX TABLE 13
CALIFORNIA BEARING ACREAGE, PRODUCTION, PER CENT OF FULL CROP AND YIELD PER BEARING ACRE OF ALL VARIETIES OF GRAPES
1919 - 1949

Crop Year	Bearing Acres	Yield per bearing	Production Estimate		Per cent of full crop, Nov. 1[a]	Calculated full or 100% crop	
			Final	Preliminary of Nov. 1[a]		Production[b]	Yield per acre[c]
1	2	3	4	5	6	7	8
Acres		Tons			%	Tons	
1919	292,000	4.6	1,345,000		94		
1920	308,000	4.1	1,273,000		90		
1921	332,000	3.5	1,149,000		66		
1922	364,000	5.0	1,806,000		96		
1923	410,000	4.9	2,007,000	1,691,000	90	1,879,000	4.6
1924	470,000	3.3	1,535,000	1,550,000	69	2,246,000	4.8
1925	527,000	3.9	2,050,000	1,989,000	75	2,652,000	5.0
1926	565,000	3.7	2,069,000	2,050,000	74	2,770,000	4.9
1927	579,000	4.2	2,406,000	2,372,000	84	2,824,000	4.9
1928	577,000	4.1	2,366,000	2,327,000	84	2,770,000	4.8
1929	566,000	3.2	1,827,000	1,775,000	66	2,689,000	4.8
1930	546,000	4.0	2,181,000	2,091,000	84	2,489,000	4.6
1931	527,000	2.5	1,320,000	1,296,000	54	2,400,000	4.6
1932	515,000	3.7	1,926,000	1,882,000	75	2,509,000	4.9
1933	498,000	3.3	1,660,000	1,559,000	65	2,398,000	4.8
1934	488,000	3.5	1,700,000	1,507,000	65	2,318,000	4.8
1935	479,000	4.6	2,194,000	2,065,000	80	2,581,000	5.4
1936	473,000	3.6	1,714,000	1,656,000	63	2,629,000	5.6
1937	481,000	5.1	2,454,000	2,409,000	89	2,707,000	5.6
1938	485,000	5.2	2,531,000	2,331,000	85	2,742,000	5.7
1939	484,000	4.6	2,228,000	2,173,000	76	2,859,000	5.9
1940	482,000	4.7	2,250,000	2,281,000	77	2,962,000	6.1
1941	487,000	5.2	2,547,000	2,411,000	83	2,905,000	6.0
1942	490,000	4.4	2,160,000	2,300,000	76	3,026,000	6.2
1943	490,000	5.7	2,789,000	2,610,000	91	2,868,000	5.9
1944	491,000	5.1	2,514,000	2,414,000	79	3,056,000	6.2
1945	493,000	5.4	2,663,000	2,678,000	87	3,078,000	6.2
1946	494,000	6.0	2,958,000	2,628,000	85	3,092,000	6.3
1947	500,000	5.7	2,836,000	2,826,000	82	3,446,000	6.9
1948	498,000	5.7	2,857,000	2,773,000	81	3,423,000	6.9
1949	490,000	5.2	2,526,000[d]	2,767,000	77	3,594,000	7.3

[a] Current production, col. 4, and per cent of full crop, col. 5, as of November 1, 1919-1941 and as of October 1, 1942-1949.

[b] Current production, col. 4, divided by per cent of full crop, col. 5.

[c] Yield, col. 2, divided by per cent of full crop, col. 5.

[d] Preliminary estimate as of December 1, 1949.

SOURCE: Compiled by S. W. Shear, Giannini Foundation of Agricultural Economics, University of California, March 1950, from reports of the California Crop Reporting Service except cols. 6 and 7 are approximate hypothetical full crops calculated by S. W. Shear as stated in footnotes c and d.

APPENDIX TABLE 14

CALIFORNIA BEARING ACREAGE, PRODUCTION, PER CENT OF FULL CROP, AND YIELD PER BEARING ACRE OF TABLE GRAPE VARIETIES, 1919 — 1949

Crop Year	Bearing Acreage	Yield Per Bearing Acre	Production Estimates		Per Cent of Full Crop Nov. 1[a]	Calculated Full or 100% Crop	
			Final Estimate	Preliminary Nov. 1[a]		Production[b]	Yield Per Acre[c]
	1	2	3	4	5	6	7
	Acres	Tons			%	Tons	
1919	53,000	3.8	204,000		95		
1920	57,000	3.6	203,000		82		
1921	61,000	3.0	186,000		69		
1922	66,000	4.4	289,000		92		
1923	75,000	4.1	305,000	340,000	82	415,000	5.5
1924	91,000	4.0	366,000	300,000	70	429,000	4.7
1925	108,000	3.8	415,000	404,000	72	561,000	5.2
1926	117,000	3.0	355,000	395,000	65	608,000	5.2
1927	120,000	4.0	480,000	468,000	78	600,000	5.0
1928	116,000	4.1	478,000	460,000	80	575,000	5.0
1929	111,000	2.8	306,000	327,000	62	527,000	4.7
1930	104,000	3.7	388,000	358,000	86	416,000	4.0
1931	97,000	2.4	229,000	221,000	53	417,000	4.3
1932	92,000	3.4	317,000	317,000	72	440,000	4.8
1933	87,000	3.1	270,000	270,000	65	415,000	4.8
1934	83,000	3.6	296,000	266,000	64	416,000	5.0
1935	80,000	4.6	372,000	367,000	78	471,000	5.9
1936	78,000	4.2	324,000	324,000	69	470,000	6.0
1937	79,000	5.3	416,000	399,000	85	469,000	5.9
1938	79,000	5.7	447,000	403,000	84	480,000	6.1
1939	78,000	5.1	400,000	370,000	74	500,000	6.4
1940	78,000	5.9	460,000	424,000	80	530,000	6.8
1941	80,000	6.1	482,000	407,000	75	543,000	6.8
1942	80,000	5.1	409,000	437,000	73	599,000	7.5
1943	79,000	7.0	553,000	498,000	88	560,000	7.1
1944	80,000	6.4	513,000	482,000	79	610,000	7.6
1945	80,000	6.4	512,000	513,000	83	618,000	7.7
1946	80,000	7.9	630,000	529,000	84	630,000	7.9
1947	81,000	7.6	620,000	612,000	85	720,000	8.9
1948	85,000	7.0	592,000	606,000	81	748,000	8.7
1949	90,000	5.8	515,000[d]	578,000	75	771,000	8.6

a/ Current production, col. 4, and per cent of full crop, col. 5, as of November 1, 1949-1941 and as of October 1, 1942-1949. See footnote to table 19 for list of table varieties.

b/ Current production, col. 4, divided by per cent of full crop, col. 5.

c/ Yield, col. 2, divided by per cent of full crop, col. 5.

d/ Estimate of December 1, 1949.

Source: Compiled by S. W. Shear, Giannini Foundation of Agricultural Economics, University of California, March 1950, from reports of the Crop Reporting Service except cols. 6 and 7 are approximately hypothetical full crops calculated by S. W. Shear as stated in footnotes c and d.

APPENDIX TABLE 15

CALIFORNIA BEARING ACREAGE, PRODUCTION, PER CENT OF FULL CROP, AND YIELD PER BEARING ACRE OF WINE GRAPE VARIETIES, 1919 — 1949

Crop Year	Bearing Acreage	Yield Per Bearing Acre	Production Estimates		Per Cent of Full Crop Nov. 1[a]	Calculated full or 100% crop	
			Final	Preliminary Nov. 1[a]		Production[b]	Yield Per Acre[c]
	1	2	3	4	5	6	7
	Acres	Tons			%	Tons	
1919	95,000	4.1	396,000		93		
1920	99,000	3.4	338,000		90		
1921	102,000	3.1	314,000		69		
1922	108,000	4.2	454,000	400,000	102	392,000	3.6
1923	117,000	3.3	385,000	428,000	90	476,000	4.1
1924	127,000	2.4	305,000	350,000	70	500,000	3.9
1925	140,000	3.2	442,000	385,000	82	470,000	3.4
1926	155,000	2.6	412,000	414,000	82	505,000	3.3
1927	170,000	2.9	487,000	470,000	87	540,000	3.2
1928	180,000	2.7	482,000	470,000	84	560,000	3.1
1929	188,000	2.3	428,000	427,000	73	585,000	3.1
1930	188,000	2.6	486,000	511,000	81	631,000	3.4
1931	184,000	1.7	316,000	341,000	60	568,000	3.1
1932	182,000	2.1	388,000	388,000	68	571,000	3.1
1933	176,000	2.3	402,000	373,000	66	565,000	3.2
1934	173,000	2.7	474,000	442,000	75	589,000	3.4
1935	169,000	3.4	569,000	530,000	83	639,000	3.8
1936	166,000	2.9	472,000	468,000	72	650,000	3.9
1937	167,000	3.7	609,000	572,000	87	657,000	3.9
1938	167,000	3.8	639,000	589,000	86	685,000	4.1
1939	166,000	3.1	522,000	548,000	75	731,000	4.4
1940	164,000	3.1	517,000	608,000	81	751,000	4.6
1941	165,000	3.3	549,000	583,000	81	720,000	4.4
1942	165,000	2.9	474,000	537,000	79	680,000	4.1
1943	165,000	3.5	575,000	531,000	87	610,000	3.7
1944	163,000	3.5	563,000	535,000	81	660,000	4.0
1945	165,000	3.8	619,000	554,000	84	660,000	4.0
1946	165,000	4.1	684,000	611,000	84	727,000	4.4
1947	169,000	3.1	517,000	578,000	74	781,000	4.6
1948	175,000	3.5	620,000	609,000	79	771,000	4.4
1949	168,000	3.1	527,000[d]	593,000	76	780,000	4.6

[a] Current production, col. 4, and per cent of full crop, col. 5, as of November 1, 1919-1941 and as of October 1, 1942-1949. See footnote to table 19 for list of wine varieties.

[b] Current production, col. 4, divided by per cent of full crop, col. 5.

[c] Yield, col. 2, divided by per cent of full crop, col. 5.

[d] Estimate of December 1, 1949.

Source: Compiled by S. W. Shear, Giannini Foundation of Agricultural Economics, University of California, March 1950, from reports of the Crop Reporting Service except cols. 6 and 7 are approximately hypothetical full crops calculated by S. W. Shear as stated in footnotes c and d.

APPENDIX TABLE 16

CALIFORNIA BEARING ACREAGE, PRODUCTION, PER CENT OF FULL CROP, AND YIELD PER BEARING ACRE OF RAISIN GRAPE VARIETIES

1919 — 1949

Crop Year	Bearing Acreage	Yield Per Bearing Acre	Production Estimates		Per Cent of Full Crop Nov. 1[a]	Calculated Full or 100% Crop	
			Final	Preliminary of Nov. 1[a]		Production[b]	Yield Per Acre[c]
	1	2	3	4	5	6	7
	Acres		Tons		%	Tons	
1919	143,000	5.2	745,000		98		
1920	152,000	4.8	732,000		90		
1921	168,000	3.8	649,000		67		
1922	189,000	5.6	1,063,000		100		
1923	218,000	6.0	1,317,000		91		
1924	252,000	3.4	864,000	900,000	65	1,385,000	5.5
1925	279,000	4.3	1,193,000	1,200,000	73	1,644,000	5.9
1926	292,000	4.4	1,302,000	1,241,000	75	1,655,000	5.7
1927	289,000	5.0	1,439,000	1,434,000	85	1,687,000	5.8
1928	281,000	5.0	1,406,000	1,397,000	85	1,644,000	5.8
1929	267,000	4.1	1,093,000	1,021,000	65	1,571,000	5.9
1930	255,000	5.1	1,307,000	1,222,000	84	1,455,000	5.7
1931	247,000	3.1	775,000	734,000	52	1,412,000	5.7
1932	241,000	5.1	1,221,000	1,177,000	79	1,490,000	6.2
1933	235,000	4.2	988,000	916,000	65	1,409,000	6.0
1934	232,000	4.0	930,000	799,000	61	1,310,000	5.6
1935	230,000	5.4	1,253,000	1,168,000	80	1,460,000	6.3
1936	230,000	4.0	918,000	864,000	58	1,490,000	6.5
1937	236,000	6.1	1,429,000	1,438,000	91	1,580,000	6.7
1938	239,000	6.0	1,445,000	1,339,000	85	1,575,000	6.6
1939	239,000	5.5	1,306,000	1,255,000	77	1,630,000	6.8
1940	239,000	5.3	1,273,000	1,249,000	75	1,665,000	7.0
1941	243,000	6.2	1,516,000	1,421,000	86	1,652,000	6.8
1942	245,000	5.2	1,277,000	1,326,000	75	1,768,000	7.2
1943	246,000	6.8	1,661,000	1,581,000	93	1,700,000	6.9
1944	247,000	5.8	1,438,000	1,397,000	79	1,768,000	7.2
1945	248,000	6.2	1,532,000	1,611,000	90	1,790,000	7.2
1946	249,000	6.6	1,644,000	1,488,000	85	1,751,000	7.0
1947	250,000	6.8	1,699,000	1,636,000	87	1,880,000	7.5
1948	238,000	6.9	1,645,000	1,558,000	82	1,900,000	8.0
1949	232,000	6.4	1,484,000[d]	1,596,000	79	2,020,000	8.7

[a] Current production, col. 4, and per cent of full crop, col. 5, as of November 1, 1949-1941 and as of October 1, 1942-1949. See footnote to table 19 for list of raisin varieties.

[b] Current production, col. 4, divided by per cent of full crop, col. 5.

[c] Yield, col. 2, divided by per cent of full crop, col. 5.

[d] Preliminary estimate as of December 1, 1949.

Source: Compiled by S. W. Shear, Giannini Foundation of Agricultural Economics, University of California, March 1950, from reports of California Crop Reporting service, except cols. 6 and 7 are approximate hypothetical full crops calculated by S. W. Shear as stated in footnotes c and d.

APPENDIX TABLE 17
CALIFORNIA TABLE AND RAISIN GRAPES, PER CENT OF FULL CROP AS OF OCTOBER 1, BY DISTRICTS, 1930-1949

Year	Table Varieties					Raisin Varieties			
	District Number and Name a/								
	5	5A	3 and 6	8		5	5A	8	
	Sacramento Valley	San Joaquin Valley	Sierra Mountain	Southern Counties	State	Sacramento Valley	San Joaquin Valley	Southern Counties	State
	1	2	3	4	5	6	7	8	9
	Per Cent of Full Crop b/								
Averages:									
1930-1939	61	72	64	74	71	70	73	75	73
1930-1934	53	67	55	71	65	64	66	74	66
1935-1939	69	77	72	76	76	77	80	76	79
1940-1944	69	80	70c/	80	79	72	82	77	82
1945-1949	80	82	85d/	80	82	82	85	76	85
Annual:									
1930	84	84	85	84	84	87	82	78	82
1931	17	51	37	64	48	36	50	70	50
1932	58	74	75	83	73	62	80	87	80
1933	51	63	50	66	62	71	61	73	61
1934	57	63	30	60	60	66	57	64	57
1935	58	79	70	81	77	60	81	83	80
1936	48	69	50	78	67	63	62	66	62
1937	82	82	62	74	81	85	91	78	90
1938	79	83	85	75	82	80	85	84	85
1939	78	74	95	73	75	75	80	68	80
1940	84	78	80	73	78	83	73	71	73
1941	49	78	55	80	75	63	87	77	86
1942	57	75	65	77	73	73	75	75	75
1943	73	88	-e/	89	88	73	94	81	93
1944	80	79	80	82	79	68	81	83	81
1945	88	85	95	77	85	80	92	71	91
1946	78	84	75	88	84	80	85	83	85
1947	80	86	-	76	85	80	88	72	87
1948	80	81	-	78	81	84	82	71	82
1949	72	75	-	82	75	87	79	81	79

a/ Official districts as used by the California Crop Reporting Service in reporting per cent of full crop are as follows: No. 1: North Coast --- Del Norte, Humboldt, and Mendocino; No. 4: Bay and Central Coast --- Lake, Sonoma, Napa, Marin, San Francisco, San Mateo, Contra Costa, Alameda, Santa Clara, Santa Cruz, Monterey, and San Luis Obispo; No. 5: Sacramento Valley --- Tehama, Butte, Yuba, Glenn, Colusa, Sutter, Yolo, Solano, and Sacramento; No. 5A: San Joaquin Valley --- San Joaquin, Stanislaus, Merced, Madera, Fresno, Tulare, Kings, and Kern; Nos. 3 and 6: Sierra Mountain --- Modoc south through Inyo of very minor importance in grape growing; No. 8: Southern --- Counties south of Tehachapi Mountains, Santa Barbara, Ventura, Los Angeles, San Bernardino, Riverside, Imperial, San Diego, and Orange. Note that crop reporting districts in this table differ from those used by S. W. Shear elsewhere in this report on acreage, production, and crush, except for southern California. Moreover, the Central Coast district as used by Shear corresponds to Crop Reporting District 4, except that Humboldt and Mendocino are included in it. b/ No official county or district estimates of tonnage of grape production or yield per bearing acre are available so these estimates of per cent of full crop are included. They are the only official historical series giving approximate relative indications of grape yields per bearing acre by districts. They are averages of individual opinion-estimates of voluntary crop reporters who cooperate with the state and Federal Crop Reporting Service. See footnote to table 19 for list of table and raisin varieties. c/ Four-year average. d/ Two-year average. e/ Dash indicates no data reported.

Source: Compiled by S. W. Shear, Giannini Foundation of Agricultural Economics, University of California, from October issues of California Fruit and Nut Crop Report of California Crop Reporting Service.

APPENDIX TABLE 18

CALIFORNIA WINE GRAPES, PER CENT OF FULL CROP BY CROP REPORTING DISTRICTS AS OF OCTOBER 1, 1930 — 1949

Year	District Number and Name[a]						
	1[b]	4	5	5A	3 and 6	8	
	North Coast	Bay & Central Coast	Sacramento Valley	San Joaquin Valley	Sierra Mountain	Southern Counties	State
	1	2	3	4	5	6	7
	Per Cent of Full Crop[b]						
Averages:							
1930-1939	69	70	72	76	70	76	74
1930-1934	62	65	65	71	67	70	69
1935-1939	77	76	79	81	73	81	79
1940-1944	76	80	79	84	75	81	81
1945-1949	72	77	78	82	86	78	79
Annual:							
1930	56	72	81	86	88	77	80
1931	56	55	48	59	58	66	58
1932	70	60	65	68	59	82	67
1933	53	56	63	68	65	65	65
1934	74	81	67	74	65	58	73
1935	84	81	83	83	86	83	82
1936	64	58	74	72	70	82	70
1937	81	84	84	87	68	81	84
1938	82	85	88	85	70	82	84
1939	72	71	67	79	70	79	76
1940	75	80	80	83	75	75	80
1941	74	80	76	84	50	82	81
1942	78	80	78	79	80	80	79
1943	70	85	84	89	85	83	86
1944	85	76	78	83	85	84	81
1945	85	85	84	86	90	73	83
1946	68	84	82	86	85	84	84
1947	55	72	79	80	90	63	74
1948	85	77	70	81	85	76	79
1949	71	70	86	77	85	83	76

[a] Official districts as used by the California Crop Reporting Service in reporting per cent of full crop are as follows:

No. 1. North Coast --- Del Norte, Humboldt, and Mendocino.

No. 4. Bay and Central Coast --- Lake, Sonoma, Napa, Marin, San Francisco, San Mateo, Contra Costa, Alameda, Santa Clara, Santa Cruz, Monterey, and San Luis Obispo.

No. 5. Sacramento Valley --- Tehama, Butte, Yuba, Glenn, Colusa, Sutter, Yolo, Solano, and Sacramento.

No. 5A. San Joaquin Valley --- San Joaquin, Stanislaus, Merced, Madera, Fresno, Tulare, Kings, and Kern.

Nos. 3 and 6. Sierra Mountain --- Modoc south through Inyo of very minor importance in grape growing.

No. 8. Southern --- Counties south of Tehachapi Mountains, Santa Barbara, Ventura, Los Angeles, San Bernardino, Riverside, Imperial, San Diego, and Orange.

Note that crop reporting districts in this table differ from those used by S. W. Shear elsewhere in this report on acreage, production, and crush, except for southern California. Moreover, the Central Coast district as used by Shear corresponds to Crop Reporting District 4, except that Humboldt and Mendocino are included in it.

[b] No official county or district estimates of tonnage of grape production or yield per bearing acre are available so these estimates of per cent of full crop are included. They are the only official historical series giving approximate relative indications of grape yields per bearing acre by districts. They are averages of individual opinion-estimates of voluntary crop reporters who cooperate with the state and federal Crop Reporting Service. See footnote to table 19 for list of wine varieties.

Source: Compiled by S. W. Shear, Giannini Foundation of Agricultural Economics, College of Agriculture, University of California, April 1950, from October issues of mimeographed California Fruit and Nut Crops, California Cooperative Crop Reporting Service.

APPENDIX TABLE 19

GRAPE PRODUCTION: UNITED STATES AND CALIFORNIA BY VARIETAL CLASSES

1919 — 1949

Crop Year	United States Total	Other States Total	California			
				Varietal Class[b]		
			Total	Raisin	Table	Wine
	1	2	3	4	5	6
Averages:	Thousands of Short Tons, Fresh Weight[a]					
1919-1923	1,734	218	1,516	901	237	378
1924-1928	2,321	236	2,085	1,241	419	425
1929-1933	2,073	290	1,783	1,077	302	404
1934-1938	2,346	227	2,119	1,195	371	553
1945-1948	3,005	177	2,828	1,630	588	610
Annual:						
1919	1,574	229	1,345	745	204	396
1920	1,520	247	1,273	732	203	338
1921	1,268	119	1,149	649	186	314
1922	2,084	278	1,806	1,063	289	454
1923	2,226	219	2,007	1,317	305	385
1924	1,774	239	1,535	864	366	305
1925	2,200	150	2,050	1,193	415	442
1926	2,384	315	2,069	1,302	355	412
1927	2,592	186	2,406	1,439	480	487
1928	2,653	287	2,366	1,406	478	482
1929	2,086	259	1,827	1,093	306	428
1930	2,458	277	2,181	1,307	388	486
1931	1,647	327	1,320	775	229	316
1932	2,233	307	1,926	1,221	317	388
1933	1,939	279	1,660	988	270	402
1934	1,958	258	1,700	930	296	474
1935	2,477	283	2,194	1,253	372	569
1936	1,897	183	1,714	918	324	472
1937	2,726	272	2,454	1,429	416	609
1938	2,671	140	2,531	1,445	447	639
1939	2,449	221	2,228	1,306	400	522
1940	2,466	216	2,250	1,273	460	517
1941	2,725	178	2,547	1,516	482	549
1942	2,396	236	2,160	1,277	409	474
1943	2,965	176	2,789	1,661	553	575
1944	2,712	198	2,514	1,438	513	563
1945	2,781	118	2,663	1,532	512	619
1946	3,160	202	2,958	1,644	630	684
1947	3,036	200	2,836	1,699	620	517
1948	3,044	187	2,857	1,645	592	620
1949[c]	2,702	176	2,526	1,484	515	527

a/ Includes harvested and unharvested production.

b/ The chief varieties included in each class by the Crop Reporting Service according to the most usual use are:

Raisin:	Thompson Seedless, Muscat, Sultana, and Zante Currant.
Table:	Tokay, Malaga, Emperor, Red Malaga, Cornichon, Almeria, Ribier.
Wine:	Zinfandel, Alicante Bouschet, Carignane, Petite Sirah, Mission, Mataro, and several minor black and white varieties.

c/ Preliminary estimates of December 1, 1949. See California tables 27, 29, 31 and 33 for later 1949 estimates, utilization based on more complete utilization data than available when official production estimates as of December 1, 1949 were made.

Source: Compiled by S. W. Shear, Giannini Foundation of Agricultural Economics, University of California, March 1950, from official estimates of the California Crop Reporting Service and the United States Crop Reporting Board.

APPENDIX TABLE 20

GRAPES: PRODUCTION, TOTAL AND HAVING VALUE, UNITED STATES, CALIFORNIA, AND OTHER STATES, 1934 — 1949

Year of Harvest	Production					
	Total[a]			Having value		
	United States	California	Other States	United States	California	Other States[b]
	1	2	3	4	5	6
	Short Tons					
Averages:						
1934-1938	2,345,940	2,118,600	227,340	2,343,940	2,118,600	225,340
1935-1939	2,444,210	2,224,200	220,010	2,442,290	2,224,200	218,090
1940-1944	2,652,840	2,452,000	200,840	2,652,360	2,452,000	200,360
1945-1948	3,005,425	2,828,500	176,925	3,002,365	2,825,500	176,865
Annual:						
1934	1,957,600	1,700,000	257,600	1,957,200	1,700,000	257,200
1935	2,477,450	2,194,000	283,450	2,477,150	2,194,000	283,150
1936	1,897,350	1,714,000	183,350	1,897,350	1,714,000	183,350
1937	2,726,150	2,454,000	272,150	2,716,850	2,454,000	262,850
1938	2,671,150	2,531,000	140,150	2,671,150	2,531,000	140,150
1939	2,448,950	2,228,000	220,950	2,448,950	2,228,000	220,950
1940	2,466,450	2,250,000	216,450	2,464,050	2,250,000	214,050
1941	2,724,900	2,547,000	177,900	2,724,900	2,547,000	177,900
1942	2,395,500	2,160,000	235,500	2,395,500	2,160,000	235,500
1943	2,965,250	2,789,000	176,250	2,965,250	2,789,000	176,250
1944	2,712,100	2,514,000	198,100	2,712,100	2,514,000	198,100
1945[a]	2,781,400	2,663,000	118,400	2,769,400	2,651,000	118,400
1946	3,159,500	2,958,000	201,500	3,159,500	2,958,000	201,500
1947	3,036,400	2,836,000	200,400	3,036,400	2,836,000	200,400
1948	3,044,400	2,857,000	187,400	3,044,160	2,857,000	187,160
1949[c]	2,701,500	2,526,000	175,500	2,701,500	2,526,000	175,500

a/ Total production, 1945, includes 12,000 tons (fresh basis) of California raisin grapes lost on drying trays by rain damage, excluded from production having value.

b/ "Other states" calculated by subtracting California data from United States totals. States for which so little production that annual estimate not made and hence excluded from totals for the United States and "other" states because no estimate available are (1) for all years, Maine, Minnesota, New Hampshire, Vermont, North Dakota, South Dakota, Mississippi, Louisiana, Montana, Wyoming, and Nevada; and (2) excluded only since 1946: Massachusetts, Rhode Island, Connecticut, Wisconsin, Nebraska, Delaware, Maryland, Florida, Kentucky, Tennessee, Alabama, Oklahoma, Texas, Idaho, Colorado, New Mexico, and Utah.

c/ Preliminary official estimates as of December 1, 1949. Later unofficial estimates of California production for 1949 are given in tables 27, 29, 31, and 33 on California utilization based on more complete 1949 utilization data than available when December 1 official estimates were made.

Source: Compiled by S. W. Shear, Giannini Foundation of Agricultural Economics, University of California, Berkeley, February 1950, from U. S. Bureau of Agricultural Economics, Fruits (non-citrus) Production, Farm Disposition, Value and Utilization of Sales. Processed: (1) May 1948, pp. 79-80 for data 1934-1944 (also similar California data, 1909-1933); (2) July 1948, pp. 24-25 for 1945 data; (3) July 1949, p. 20 for data 1946-1948.

APPENDIX TABLE 21
GRAPES: FARM DISPOSITION, UNITED STATES, CALIFORNIA AND OTHER STATES
1934 — 1949

Year of Harvest	Farm Disposition					
	Farm Household Use			Sold		
	United States	California	Other States[a]	United States	California	Other States[a]
	1	2	3	4	5	6
	Short Tons					
Averages:						
1934-1938	42,790	3,520	39,270	2,301,150	2,115,080	186,070
1935-1939	40,842	3,480	37,362	2,401,448	2,220,720	180,728
1940-1944	35,450	3,060	32,390	2,616,910	2,448,940	167,970
1945-1948	28,548	2,700	25,848	2,973,818	2,822,800	151,018
Annual:						
1934	49,090	3,600	45,490	1,908,110	1,696,400	211,710
1935	47,690	3,500	44,190	2,429,460	2,190,500	238,960
1936	39,290	3,500	35,790	1,858,060	1,710,500	147,560
1937	45,420	3,500	41,920	2,671,430	2,450,500	220,930
1938	32,460	3,500	28,960	2,638,690	2,527,500	111,190
1939	39,350	3,400	35,950	2,409,600	2,224,600	185,000
1940	36,720	3,300	33,420	2,427,330	2,246,700	180,630
1941	34,750	3,300	31,450	2,690,150	2,543,700	146,450
1942	36,970	3,300	33,670	2,358,530	2,156,700	201,830
1943	31,760	2,700	29,060	2,933,490	2,786,300	147,190
1944	37,050	2,700	34,350	2,675,050	2,511,300	163,750
1945	26,590	2,700	23,890	2,742,810	2,648,300	94,510
1946	32,800	2,700	30,100	3,126,700	2,955,300	171,400
1947	27,100	2,700	24,400	3,009,300	2,833,300	176,000
1948	27,700	2,700	25,000	3,016,460	2,854,300	162,160
1949[b]	26,850	2,700	24,150	2,674,650	2,523,300	151,350

[a] "Other states" calculated by subtracting California data from United States totals. States producing so little that annual estimate not made and hence excluded from totals for the United States and "other" states are: (1) for all years, Maine, Minnesota, New Hampshire, Vermont, North Dakota, South Dakota, Mississippi, Louisiana, Montana, Wyoming, and Nevada; and (2) excluded only since 1946: Massachusetts, Rhode Island, Connecticut, Wisconsin, Nebraska, Delaware, Maryland, Florida, Kentucky, Tennessee, Alabama, Oklahoma, Texas, Idaho, Colorado, New Mexico, and Utah.

[b] Preliminary official 1949 estimates as of December 1, 1949. Later unofficial estimates of California production for 1949 are given in tables 27, 29, 31, and 33 on California utilization based on more complete 1949 utilization data than available when December 1 official estimates were made.

Source: Compiled by S. W. Shear, Giannini Foundation of Agricultural Economics, University of California, Berkeley, April 1950, from U. S. Bureau of Agricultural Economics, Fruits (non-citrus) Production, Farm Disposition, Value and Utilization of Sales. Processed: (1) May 1948, pp. 79-80 for data 1934-1944 (also similar California data 1909-1933); (2) July 1948, pp. 24-25 for 1945 data; (3) July 1949, p. 20 for data 1946-1948.

APPENDIX TABLE 22
GRAPES: UTILIZATION IN STATES OTHER THAN CALIFORNIA
1934 — 1949

Year of Harvest		Farm Disposition			Utilization of sales	
	Production Total	Production of Value	Farm Home Use	Sold	Fresh Sales[a]	Processed Total[a]
	1	2	3	4	5	6
	Short Tons					
Averages:						
1934-1938	227,340	225,340	39,270	186,070	130,407	55,663
1935-1939	220,010	218,090	37,362	180,728	115,208	65,520
1940-1944	200,840	200,360	32,390	167,970	63,302	104,668
1945-1948	176,925	176,865	25,848	151,017	35,925	115,092
Annual:						
1934	257,600	257,200	45,490	211,710	164,146	47,564
1935	283,450	283,150	44,190	238,960	186,096	52,864
1936	183,350	183,350	35,790	147,560	96,586	50,974
1937	272,150	262,850	41,920	220,930	145,914	75,016
1938	140,150	140,150	28,960	111,190	59,292	51,898
1939	220,950	220,950	35,950	185,000	88,150	96,850
1940	216,450	214,050	33,420	180,630	82,450	98,180
1941	177,900	177,900	31,450	146,450	57,800	88,650
1942	235,500	235,500	33,670	201,830	74,580	127,250
1943	176,250	176,250	29,060	147,190	48,120	99,070
1944	198,100	198,100	34,350	163,750	53,560	110,190
1945	118,400	118,400	23,890	94,510	27,160	67,350
1946	201,500	201,500	30,100	171,400	42,950	128,450
1947	200,400	200,400	24,400	176,000	39,950	136,050
1948	187,400	187,160	25,000	162,160	33,640	128,520
1949[b]	175,500	175,500	24,150	151,350		

[a] California is the only state drying grapes. Processed in "other" states is largely crushed for wine, brandy, and unfermented and frozen juice. Source reports fresh sales as including small quantities canned in a few states. However, Washington data do not, as its canned is known to be included in total processed and not in fresh sales given here. Canned in Michigan, New York, and Pennsylvania is also included in "processed" although source states that the small quantities canned in states other than California are included in fresh shipments.

[b] Preliminary official estimates for 1949 as of December 1, 1949.

Source: Compiled by S. W. Shear, Giannini Foundation of Agricultural Economics, February 1950, from U. S. Bureau of Agricultural Economics, Fruits (Non-citrus) Production, Farm Disposition, Value, and Utilization of Sales. Processed: (1) May 1948, pp. 79-82 for data 1934-1944 (also similar California data 1909-1933; (2) July 1948, pp. 25-26 for 1945 data; (3) July 1949, pp. 20-21 for data 1946-1948. "Other states" calculated by subtracting California data from United States totals. States producing so little that annual estimate not made and hence excluded from totals for the United States and "other" states are (1) for all years, Maine, Minnesota, New Hampshire, Vermont, North Dakota, South Dakota, Mississippi, Louisiana, Montana, Wyoming, and Nevada; and (2) excluded only since 1946: Massachusetts, Rhode Island, Connecticut, Wisconsin, Nebraska, Delaware, Maryland, Florida, Kentucky, Tennessee, Alabama, Oklahoma, Texas, Idaho, Colorado, New Mexico, and Utah.

APPENDIX TABLE 23

GRAPES: UTILIZATION IN STATES OTHER THAN CALIFORNIA

PER CENT OF PRODUCTION HAVING VALUE, 1934-1949

Year of Harvest	Farm Disposition			Utilization of Sales	
	Production of Value	Farm Home Use	Sold	Fresh Sales[a]	Processed Total[d]
	1	2	3	4	5
	Per Cent of Production Having Value				
Averages:					
1934-1938	100.0	17.4	82.6	57.9	24.7
1935-1939	100.0	17.1	82.9	52.8	30.1
1940-1944	100.0	16.2	83.8	31.6	52.2
1945-1948	100.0	14.6	85.4	20.3	65.1
Annual:					
1934	100.0	17.7	82.3	63.8	18.5
1935	100.0	15.6	84.4	65.7	18.7
1936	100.0	19.5	80.5	52.7	27.8
1937	100.0	15.9	84.1	55.5	28.6
1938	100.0	20.7	79.3	42.3	37.0
1939	100.0	16.3	83.7	39.9	43.8
1940	100.0	15.6	84.4	38.5	45.9
1941	100.0	17.7	82.3	32.5	49.8
1942	100.0	14.3	85.7	31.7	54.0
1943	100.0	16.5	83.5	27.3	56.2
1944	100.0	17.3	82.7	27.1	55.6
1945	100.0	20.2	79.8	22.9	56.9
1946	100.0	14.9	85.1	21.3	63.8
1947	100.0	12.2	87.8	19.9	67.9
1948	100.0	13.4	86.6	18.0	68.6
1949[b]	100.0	14.9	85.1		

[a] California is the only state drying grapes. Processed, "other" states is largely crushed for wine, brandy, unfermented and frozen juice. Source reports fresh sales as including small quantities canned in a few states. But Washington does not as its canned is actually included in total processed and not in fresh sales given here. Canned, Michigan, New York, and Pennsylvania, also included in "processed" although source states that the small quantities canned in states other than California are included in fresh shipments.

[b] Based on preliminary official estimates as of December 1, 1949.

Source: Computed by S. W. Shear, Giannini Foundation of Agricultural Economics, Fruits, (Non-citrus) Production, Farm Disposition, Value and Utilization of Sales. Processed. (1) May 1948 for 1934-1944 (gives similar California data 1909-1933); (2) July 1948; (3) July 1949. "Other states" calculated by subtracting California from United States totals. States for which so little production that annual estimate not made and hence excluded from totals for United States and "other states" are: (1) for all years, Maine, Minnesota, New Hampshire, Vermont, North Dakota, South Dakota, Mississippi, Louisiana, Montana, Wyoming, and Nevada; and (2) excluded only since 1946: Massachusetts, Rhode Island, Connecticut, Wisconsin, Nebraska, Delaware, Maryland, Florida, Kentucky, Tennessee, Alabama, Oklahoma, Texas, Idaho, Colorado, New Mexico, and Utah.

APPENDIX TABLE 24
GRAPES: FRESH SALES BY CHIEF STATES, 1934-1948

Year of Harvest	United States Total	California	States Other Than California								
			Total	New Jersey	Pennsylvania	Ohio	New York	Michigan	Arkansas	Washington	Other[a]
	1	2	3	4	5	6	7	8	9	10	11
	Short Tons, Fresh Weight										
Averages:											
1934-1938	623,107	492,700	130,407	1,722	10,924	13,270	29,611	32,624	5,456	2,320	34,480
1935-1939	616,707	501,500	115,207	1,528	9,507	11,970	26,107	27,418	4,208	2,085	32,384
1940-1944	546,202	482,900	63,302	1,110	5,098	5,140	7,090	15,190	2,576	1,494	25,604
1945-1948	580,375	544,450	35,925	822	1,650	3,000	5,525	8,555	962	1,778	13,633
Annual:											
1934	633,146	469,000	164,146	1,790	13,802	14,300	33,609	48,900	8,000	2,555	41,190
1935	671,196	485,100	186,096	2,440	16,696	22,400	44,899	46,596	6,280	3,215	43,570
1936	576,286	479,700	96,586	1,720	6,610	11,750	17,526	23,990	4,670	2,400	27,920
1937	683,914	538,000	145,914	1,830	12,860	15,300	33,793	37,584	6,740	1,627	36,180
1938	550,992	491,700	59,292	830	4,650	2,600	18,228	6,050	1,590	1,804	23,540
1939	601,150	513,000	88,150	820	6,720	7,800	16,090	22,870	1,760	1,380	30,710
1940	633,250	550,800	82,450	1,130	7,550	6,800	8,380	23,360	3,100	1,250	30,880
1941	623,500	565,700	57,800	1,050	4,500	4,100	6,700	9,490	2,620	1,190	28,150
1942	593,780	519,200	74,580	1,190	6,700	5,800	9,590	19,500	2,300	1,440	28,060
1943	425,620	377,500	48,120	980	3,540	3,500	4,350	13,100	2,610	1,490	18,550
1944	454,860	401,300	53,560	1,200	3,200	5,500	6,430	10,500	2,250	2,100	22,330
1945	525,260	498,100	27,160	440	400	600	2,860	3,730	750	1,910	16,420
1946	559,650	516,700	42,950	1,240	2,400	3,500	6,880	9,300	500	1,580	17,550
1947	659,150	619,200	39,950	870	1,800	4,500	6,080	14,150	580	1,840	10,130
1948	577,440	543,800	33,640	740	2,000	3,400	6,280	6,990	2,020	1,780	10,430

[a] "Other" states, col. 11, include all not listed in table except following minor producers, for which estimates not available, are excluded in all years: Maine, Minnesota, New Hampshire, Vermont, North Dakota, South Dakota, Mississippi, Louisiana, Montana, Wyoming and Nevada. Following states included before 1947 but excluded since 1946: Massachusetts, Rhode Island, Connecticut, Wisconsin, Nebraska, Delaware, Maryland, Florida, Kentucky, Tennessee, Alabama, Oklahoma, Texas, Idaho, Colorado, New Mexico, Utah.

Source: Compiled by S. W. Shear, Giannini Foundation Agricultural Economics, University of California, Berkeley, March 1950, from U. S. Bur. Agr. Economics, Fruits (Non-citrus) Production, Farm Disposition, Value and Utilization of Sales. Processed: (1) May 1948, for 1934-1944 (also similar California data 1909-1933); (2) July 1948, for 1945; (3) July 1949 for 1946-1948.

APPENDIX TABLE 25
GRAPES: CRUSHED FOR WINE, BRANDY, AND JUICE BY CHIEF STATES, 1934-1949

Year of Harvest	United States Total	California	States Other Than California								
			Total	New Jersey	Pennsylvania	Ohio	New York	Michigan	Arkansas	Washington	Other[a]/
	1	2	3	4	5	6	7	8	9	10	11
	Fresh Weight, Short Tons										
Averages:											
1934-1938	792,463	736,800	55,663	480	4,726	6,310	29,555	7,708	1,410	3,140	2,334
1935-1939	838,721	773,200	65,521	606	5,709	8,370	33,271	8,638	2,150	4,323	2,454
1940-1944	975,688	872,020	104,668	1,162	9,562	10,060	44,434	20,080	5,170	11,904	2,296
1945-1948	1,408,642	1,293,550	115,092	735	11,675	6,125	48,105	18,390	8,080	18,610	3,372
Annual:											
1934	577,564	530,000	47,564	270	3,198	5,600	24,851	10,000	500	1,445	1,700
1935	939,864	887,000	52,864	340	4,554	6,000	30,481	5,084	480	2,375	3,550
1936	544,974	494,000	50,974	400	5,270	7,250	24,984	8,000	770	3,080	1,220
1937	986,016	911,000	75,016	730	5,340	10,500	37,347	10,956	3,500	3,343	3,300
1938	913,898	862,000	51,898	660	5,270	2,200	30,112	4,500	1,800	5,456	1,900
1939	808,850	712,000	96,850	900	8,110	15,900	43,430	14,650	4,200	7,360	2,300
1940	1,094,180	996,000	98,180	1,350	6,950	12,500	47,490	12,940	4,100	10,370	2,480
1941	1,208,650	1,120,000	88,650	1,250	5,600	7,500	39,420	15,460	6,500	11,020	1,900
1942	723,350	596,100	127,250	1,190	12,000	11,000	58,410	24,800	4,900	12,860	2,090
1943	889,070	790,000	99,070	940	9,560	9,200	33,320	27,500	3,500	12,900	2,150
1944	968,190	858,000	110,190	1,080	13,700	10,100	43,530	19,700	6,850	12,370	2,860
1945	1,237,350	1,170,000	67,350	290	4,600	3,000	26,820	8,600	3,700	17,050	3,290
1946	1,780,350	1,651,900	128,450	960	14,600	7,000	56,000	20,000	9,500	17,140	3,250
1947	1,102,050	966,000	136,050	830	14,300	8,700	52,300	26,550	11,120	18,810	3,440
1948	1,514,820	1,386,300	128,520	860	13,200	5,800	57,300	18,410	8,000	21,440	3,510
1949[b]/		887,800									

[a]/ "Other" states, col. 11, include all not listed in table separately except following, for which estimates not available, are excluded in all years: Maine, Minnesota, New Hampshire, Vermont, North Dakota, South Dakota, Mississippi, Louisiana, Montana, Wyoming and Nevada. Following states included before 1947 but excluded since 1946: Massachusetts, Rhode Island, Connecticut, Wisconsin, Nebraska, Delaware, Maryland, Florida, Kentucky, Tennessee, Alabama, Oklahoma, Texas, Idaho, Colorado, New Mexico, Utah.

[b]/ No 1949 data available except California commercial crush as reported by the Wine Institute in its Fourteenth Annual Wine Industry Statistical Survey, Part 1, March 1, 1950.

Source: Compiled by S. W. Shear, Giannini Foundation Agricultural Economics, University of California, Berkeley, March 1950, from U. S. Bur. Agr. Economics, Fruits (Non-citrus Production, Farm Disposition, Value and Utilization of Sales. Processed: (1) May 1948 for 1934-1944 (also similar California data 1909-1933); (2) July 1948 for 1945; (3) July 1949 for 1946-1948.

APPENDIX TABLE 26

CALIFORNIA GRAPES USED FOR DRYING AND COMMERCIAL CRUSH BY VARIETAL CLASSES

AVERAGES 1934 – 1938 AND 1945 – 1948

Varietal Class	Dried		Commercial Crush	
	1	2	3	4
	Tons[a]	Per Cent[b]	Tons[a]	Per Cent[b]
	Average 1945-1948			
Total	965,225	34.2	1,293,550	45.8
Raisin	963,000	59.2	483,350	29.7
Table	425	0.1	311,000	52.8
Wine	1,800	0.2	499,200	81.2
	Average 1934-1938			
Total	881,500	41.6	736,800	34.8
Raisin	874,400	73.2	186,800	15.6
Table	6,200	1.7	160,320	43.2
Wine	1,000	0.2	389,680	70.5

a/ Equivalent fresh weight in tons.

b/ Per cent utilized of harvested production of varietal group. See table 19 for list of varieties in each varietal class.

Source: Compiled by S. W. Shear, Giannini Foundation of Agricultural Economics, University of California, March 1950, from official data of the California Crop and Livestock Reporting Service.

APPENDIX TABLE 27
CALIFORNIA, PRODUCTION AND UTILIZATION OF ALL VARIETIES OF GRAPES, 1927-1949

Crop year	Harvested production[a]	Canned	Dried[b]	Used fresh for juice					Fresh table use		
				Total	Commercial crush	Other			Inter-state	Within state	Total
						Total	Within state	Inter-state			
	1	2	3	4	5	6	7	8	9	10	11
	Short tons, fresh weight										
Averages:											
1927-1929	2,121,100	2,100	1,045,300	704,100	81,600	622,500	48,700	573,800	335,000	34,600	369,600
1930-1932	1,610,000	700	848,900	499,700	69,200	430,500	67,500	363,000	223,900	36,800	260,700
1942-1944	2,487,700	14,500	1,289,600	879,300	748,000	131,300	6,000	125,300	264,500	39,800	304,300
1945-1948	2,825,500	19,575	965,225	1,442,150	1,293,550	148,600	5,000	143,600	337,925	60,625	398,550
Annual:											
1934	1,700,000	2,200	695,200	739,200	530,000	209,200	27,000	182,200	220,900	42,500	263,400
1935	2,194,000	2,400	816,000	1,123,100	887,000	236,100	18,700	217,400	210,100	42,400	252,500
1936	1,714,000	3,200	733,600	687,300	494,000	193,300	20,300	173,000	247,400	42,500	289,900
1937	2,454,000	7,500	994,000	1,136,100	911,000	225,100	11,300	213,800	270,300	46,100	316,400
1938	2,531,000	5,000	1,168,800	1,048,000	862,000	186,000	17,200	168,800	261,400	47,800	309,200
1939	2,228,000	11,000	988,600	934,800	712,000	222,800	12,400	210,400	240,400	53,200	293,600
1940	2,250,000	11,300	688,600	1,223,200	996,000	227,200	11,100	216,100	271,100	55,800	326,900
1941	2,547,000	18,000	840,000	1,338,100	1,120,000	218,100	8,800	209,300	300,200	50,700	350,900
1942	2,160,000	16,400	1,025,000	798,500	596,100	202,400	8,100	194,300	273,700	46,400	320,100
1943	2,789,000	13,000	1,605,800	851,500	790,000	61,500	5,500	56,000	280,300	38,400	318,700
1944	2,514,000	14,000	1,238,000	988,000	858,000	130,000	4,300	125,700	239,500	34,500	274,000
1945	2,651,000	11,000	969,200	1,319,800	1,170,000	149,800	5,200	144,600	297,600	53,400	351,000
1946	2,958,000	14,300	772,400	1,792,200	1,651,900	140,300	4,000	136,300	325,600	53,500	379,100
1947	2,836,000	23,000	1,225,100	1,129,000	966,000	163,000	6,300	156,700	394,700	64,200	458,900
1948	2,857,000	30,000	894,200	1,527,600	1,386,300	141,300	4,500	136,800	333,800	71,400	405,200
1949[c]	2,482,000	25,000	1,051,600	1,012,300	887,800	124,500	4,500	120,000	326,000	67,100	393,100

[a] Excludes unharvested at no value, tons: 1927, 98,600; 1928, 153,000; 1930, 433,000; 1931, 10,000; 1932, 154,000; 1933, 3,000; 1945, 12,000.

[b] Includes dried wine and table grapes probably finally used for juice, also a few raisins.

[c] Preliminary unofficial estimates for 1949 based on more complete utilization data than available when preliminary official estimates as of December 1, 1949 were made.

Source: Compiled by S. W. Shear, Giannini Foundation of Agricultural Economics, University of California, March 1950, from reports of California Crop Reporting Service, except segregation of fresh juice and table stock in all years, commercial crush 1927-1929 and harvested 1927 and 1929 are estimates by S. W. Shear.

APPENDIX TABLE 28

CALIFORNIA UTILIZATION OF ALL VARIETIES OF GRAPES: PER CENT OF HARVESTED PRODUCTION

1927 — 1949

Crop Year	Harvested Production	Canned	Dried	Used Fresh for Juice					Fresh Table Use		
				Total	Commercial Crush	Other			Inter-state	Within State	Total
						Total	Within State	Inter-state			
	1	2	3	4	5	6	7	8	9	10	11
	Per Cent of Harvested Production										
Averages:											
1927-1929	100.0	.1	49.3	33.2	3.8	29.4	2.3	27.1	15.8	1.6	17.4
1930-1932	100.0	.1	52.7	31.0	4.3	26.7	4.2	22.5	13.9	2.3	16.2
1942-1944	100.0	.6	51.4	35.6	30.0	5.6	.3	5.3	10.7	1.7	12.4
1945-1948	100.0	.7	34.1	51.1	45.8	5.3	.2	5.1	12.0	2.1	14.1
Annual:											
1934	100.0	.1	40.9	43.5	31.2	12.3	1.6	10.7	13.0	2.5	15.5
1935	100.0	.1	37.2	51.2	40.4	10.8	.9	9.9	9.6	1.9	11.5
1936	100.0	.2	42.8	40.1	28.8	11.3	1.2	10.1	14.4	2.5	16.9
1937	100.0	.3	40.5	46.3	37.1	9.2	.5	8.7	11.0	1.9	12.9
1938	100.0	.2	46.2	41.4	34.1	7.3	.7	6.6	10.3	1.9	12.2
1939	100.0	.5	44.4	41.9	31.9	10.0	.6	9.4	10.8	2.4	13.2
1940	100.0	.5	30.6	54.4	44.3	10.1	.5	9.6	12.0	2.5	14.5
1941	100.0	.7	33.0	52.5	44.0	8.5	.3	8.2	11.8	2.0	13.8
1942	100.0	.8	47.4	37.0	27.6	9.4	.4	9.0	12.7	2.1	14.8
1943	100.0	.5	57.6	30.5	28.3	2.2	.2	2.0	10.0	1.4	11.4
1944	100.0	.6	49.2	39.3	34.1	5.2	.2	5.0	9.5	1.4	10.9
1945	100.0	.4	36.6	49.8	44.1	5.7	.2	5.5	11.2	2.0	13.2
1946	100.0	.5	26.1	60.6	55.9	5.7	.2	5.5	13.9	2.3	12.8
1947	100.0	.8	43.2	39.8	34.1	5.7	.2	5.5	13.9	2.3	16.2
1948	100.0	1.0	31.3	53.5	48.5	5.0	.2	4.8	11.7	2.3	14.2
1949a/	100.0	1.0	42.4	40.8	35.8	5.0	.2	4.8	13.1	2.7	15.8

a/ Based on preliminary unofficial estimates for 1949 utilization more complete than when latest preliminary official production estimates as of December 1, 1949 were made.

Source: Compiled by S. W. Shear, Giannini Foundation of Agricultural Economics, March 1950, from tonnage data in companion table, from reports of the California Crop and Livestock Reporting Service, except segregation of fresh juice and table stock in all years, commercial crush 1927-1929 and harvested 1927 and 1929 estimates by S. W. Shear.

APPENDIX TABLE 29

CALIFORNIA PRODUCTION AND UTILIZATION OF RAISIN GRAPE VARIETIES, 1927-1949

Crop Year	Harvested Production a/	Canned	Dried b/	Used Fresh for Juice 2/			Fresh Table Use		
				Total c/	Commercial Crush	Inter-State d/	Inter-State d/	Within State	Total
	1	2	3	4	5	6	7	8	9
	Short Tons, Fresh Weight								
Averages:									
1927-1929	1,292,700	2,100	1,014,700	198,000	18,500	169,600	66,700	11,200	77,900
1930-1932	987,700	700	830,400	95,000	12,900	73,300	49,700	11,900	61,600
1942-1944	1,458,700	14,500	1,286,000	118,300	95,000	23,300	35,000	4,900	39,900
1945-1948	1,627,000	19,575	963,000	521,100	483,350	37,750	101,400	21,925	123,325
Annual:									
1934	930,000	2,200	684,000	167,200	142,000	25,200	61,700	14,900	76,600
1935	1,253,000	2,400	812,000	361,500	305,000	56,500	65,300	11,800	77,100
1936	918,000	3,200	728,000	102,700	67,000	35,700	72,100	12,000	84,100
1937	1,429,000	7,500	988,000	334,100	276,000	58,100	87,000	12,400	99,400
1938	1,445,000	5,000	1,160,000	182,900	144,000	38,900	84,100	13,000	97,100
1939	1,306,000	11,000	980,000	221,600	177,000	44,600	74,400	19,000	93,400
1940	1,273,000	11,300	684,000	477,500	418,000	59,500	81,300	18,900	100,200
1941	1,516,000	18,000	836,000	544,000	494,000	50,000	102,000	16,000	118,000
1942	1,277,000	16,400	1,016,000	147,100	95,100	52,000	89,000	8,500	97,500
1943	1,661,000	13,000	1,604,000	35,800	35,800	0	6,000	2,200	8,200
1944	1,438,000	14,000	1,238,000	172,000	154,000	18,000	10,000	4,000	14,000
1945	1,520,000	11,000	964,000	442,700	411,700	31,000	84,300	18,000	102,300
1946	1,644,000	14,300	772,000	747,800	712,800	35,000	90,600	19,300	109,900
1947	1,699,000	23,000	1,224,000	319,300	274,300	45,000	109,700	23,000	132,700
1948	1,645,000	30,000	892,000	574,600	534,600	40,000	121,000	27,400	148,400
1949 e/	1,430,000	25,000	1,050,000	226,900	192,900	34,000	102,000	26,100	128,100

a/ Chief varieties included are Thompson Seedless, Muscats, Sultanas, and Currants. Excludes unharvested tons: 1928, 60,000; 1930, 319,000, of which 316,000 were purchased and left on the vine; 1932, 21,000; and 1945, 12,000.

b/ In addition to total fresh grapes used for juice (col. 4), roughly 36,000 fresh tons a year of dried raisins were used for alcoholic beverages, 1927-1932. Much fewer raisins probably have been used thus since repeal.

c/ Includes small amounts estimated used in state for home wine making 1927-1932 (col. 4 minus cols. 5 and 6).

d/ Interstate juice shipments as shown are largely Muscats, only a few are eaten fresh.

e/ Preliminary estimates for 1949 based on more complete utilization data than available when the official preliminary production estimates as of December 1, 1949 were made.

Source: Compiled by S. W. Shear, Giannini Foundation of Agricultural Economics, March 1950, from reports of California Crop Reporting Service, except segregation of fresh juice and table stock in all years, and commercial crush before 1933 partly estimated by S. W. Shear.

APPENDIX TABLE 30

CALIFORNIA UTILIZATION OF RAISIN GRAPE VARITIES: PER CENT OF HARVESTED PRODUCTION, 1927-1949

Crop Year	Harvested Production	Canned	Dried	Used Fresh for Juice			Fresh Table Use		
				Total	Commercial Crush	Inter-State	Inter-State	Within State	Total
	1	2	3	4	5	6	7	8	9
	Per Cent of Harvested Production								
Averages:									
1927-1929	100.0	0.2	78.5	15.3	1.4	13.1	5.1	0.9	6.0
1930-1932	100.0	0.1	84.1	9.6	1.3	7.4	5.0	1.2	6.2
1934-1938	100.0	0.3	73.2	19.2	15.6	3.6	6.2	1.1	7.3
1936-1940	100.0	0.6	71.2	20.7	17.0	3.7	6.3	1.2	7.5
1942-1944	100.0	1.0	88.2	8.1	6.5	1.6	2.4	0.3	2.7
1945-1948	100.0	1.1	59.1	32.2	29.9	2.3	6.3	1.3	7.6
Annual:									
1934	100.0	0.2	73.6	18.0	15.3	2.7	6.6	1.6	8.2
1935	100.0	0.2	64.8	28.9	24.4	4.5	5.2	0.9	6.1
1936	100.0	0.3	79.3	11.2	7.3	3.9	7.9	1.3	9.2
1937	100.0	0.5	69.1	23.4	19.3	4.1	6.1	0.9	7.0
1938	100.0	0.3	80.3	12.7	10.0	2.7	5.8	0.9	6.7
1939	100.0	0.8	75.0	17.0	13.6	3.4	5.7	1.5	7.2
1940	100.0	0.9	53.7	37.5	32.8	4.7	6.4	1.5	7.9
1941	100.0	1.2	55.1	35.9	32.6	3.3	6.7	1.1	7.8
1942	100.0	1.3	79.6	11.5	7.4	4.1	6.9	0.7	7.6
1943	100.0	0.8	96.6	2.1	2.1	.0	0.4	0.1	0.5
1944	100.0	1.0	86.1	11.9	10.7	1.2	0.7	0.3	1.0
1945	100.0	0.7	63.4	29.1	27.1	2.0	5.6	1.2	6.8
1946	100.0	0.9	46.9	45.5	43.4	2.1	5.5	1.2	6.7
1947	100.0	1.4	72.0	18.8	16.1	2.7	6.5	1.3	7.8
1948	100.0	1.8	54.2	34.9	32.5	2.4	7.4	1.7	9.1
1949a/	100.0	1.9	73.4	15.8	13.4	2.4	7.1	1.8	8.9

a/ Preliminary estimates for 1949 based on more complete utilization data than available when the official preliminary production estimates as of December 1, 1949 were made.

Source: Computed by S. W. Shear, Giannini Foundation of Agricultural Economics, University of California, March 1950, from tonnage data in companion table from reports of the California Crop Reporting Service, except segregation of fresh juice and table stock in all years and commercial crush before 1933 partly estimated by S. W. Shear.

APPENDIX TABLE 31

CALIFORNIA PRODUCTION AND UTILIZATION OF TABLE GRAPE VARIETIES[a], 1927-1949

Crop Year	Harvested Production[a]	Dried[b]	Used Fresh for Juice			Fresh Table Use		
			Total	Commercial Crush	Inter-State	Inter-State	Within State[c]	Total
	1	2	3	4	5	6	7	8
	Short Tons, Fresh Weight							
Averages:								
1927-1929	368,800	19,000	58,200	30,100	28,100	268,200	23,400	291,600
1930-1932	250,700	11,300	40,300	19,900	20,400	174,200	24,900	199,100
1942-1944	491,700	3,500	223,800	220,100	3,700	229,500	34,900	264,400
1945-1948	588,500	425	312,850	311,000	1,850	236,525	38,700	275,225
Annual:								
1934	296,000	9,200	100,000	89,000	11,000	159,200	27,600	186,800
1935	372,000	3,600	193,000	192,000	1,000	144,800	30,600	175,400
1936	324,000	5,400	112,800	105,000	7,800	175,300	30,500	205,800
1937	416,000	5,800	193,200	191,000	2,200	183,300	33,700	217,000
1938	447,000	6,800	228,100	224,600	3,500	177,300	34,800	212,100
1939	400,000	8,000	191,800	187,000	4,800	166,000	34,200	200,200
1940	460,000	4,000	229,300	227,000	2,300	189,800	36,900	226,700
1941	482,000	3,800	245,300	243,000	2,300	198,200	34,700	232,900
1942	409,000	8,600	177,800	174,800	3,000	184,700	37,900	222,600
1943	553,000	1,800	240,700	235,700	5,000	274,300	36,200	310,500
1944	513,000	0	253,000	250,000	3,000	229,500	30,500	260,000
1945	512,000	0	263,300	260,300	3,000	213,300	35,400	248,700
1946	630,000	400	360,400	358,600	1,800	235,000	34,200	269,200
1947	620,000	1,100	292,700	290,700	2,000	285,000	41,200	326,200
1948	592,000	200	335,000	334,400	600	212,800	44,000	256,800
1949[d]	515,000	1,600	248,400	247,400	1,000	224,000	41,000	265,000

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a/ Chief varieties included in table grape production are Tokay, Malaga, Emperor, Red Malaga, Cornichon, Almeria, Ribier and Concord. Data Given exclude the following unharvested tonnages: 1927, 98,600 (estimate by S. W. Shear); 1928, 75,000; 1930, 74,000; 1932, 108,000; and 1933, 3,000.

b/ Dried table grape varieties presumably are used for juice purposes eventually.

c/ Probably very few table grape varieties are used for home wine making in California and all intrastate use as given in col. 7 assumed as used for fresh table purposes.

d/ Preliminary unofficial estimates for 1949, based on more complete utilization data than available when latest official preliminary production estimates as of December 1, 1949 were made.

Source: Compiled by S. W. Shear, Giannini Foundation, University of California, March 1950, largely based on reports of California Crop Reporting Service except segregation of fresh juice and table stock in all years, commercial crush before 1933, and harvested production 1927 and 1929 partially estimated by S. W. Shear.

APPENDIX TABLE 32

CALIFORNIA UTILIZATION OF TABLE GRAPE VARIETIES: PER CENT OF HARVESTED PRODUCTION, 1927-1949

Crop Year	Harvested Production	Dried	Used Fresh for Juice			Fresh Table Use		
			Total	Commercial Crush	Inter-State	Inter-State	Within State	Total
	1	2	3	4	5	6	7	8
	Per Cent of Harvested Production							
Averages:								
1927-1929	100.0	5.2	15.8	8.2	7.6	72.7	6.3	79.0
1930-1932	100.0	4.5	16.1	8.0	8.1	69.5	9.9	79.4
1942-1944	100.0	0.7	45.4	44.8	0.7	46.7	7.1	53.8
1945-1948	100.0	0.1	54.0	53.7	0.3	39.4	6.5	45.9
Annual:								
1927	100.0	4.1	18.6	12.1	6.5	71.2	6.1	77.3
1928	100.0	4.0	12.7	6.9	5.8	77.8	5.5	83.3
1929	100.0	8.0	16.2	4.8	11.4	68.1	7.7	75.8
1930	100.0	2.6	19.3	9.1	10.2	70.6	7.5	78.1
1931	100.0	6.1	13.1	1.7	11.4	71.6	9.2	80.8
1932	100.0	5.7	14.4	12.9	1.5	65.6	14.3	79.9
1933	100.0	4.6	39.9	38.9	1.0	46.3	9.2	55.5
1934	100.0	3.1	33.8	30.1	3.7	53.8	9.3	63.1
1935	100.0	1.0	51.9	51.6	0.3	38.9	8.2	47.1
1936	100.0	1.7	34.8	32.4	2.4	54.1	9.4	63.5
1937	100.0	1.4	46.4	45.9	0.5	44.1	8.1	52.2
1938	100.0	1.5	51.0	50.2	0.8	39.7	7.8	47.5
1939	100.0	2.0	48.0	46.8	1.2	41.5	8.5	50.0
1940	100.0	0.9	49.8	49.3	0.5	41.3	8.0	49.3
1941	100.0	0.8	50.9	50.4	0.5	41.1	7.2	48.3
1942	100.0	2.1	43.5	42.8	0.7	45.1	9.3	54.4
1943	100.0	0.3	43.5	42.6	0.9	49.6	6.6	56.2
1944	100.0	0.0	49.3	48.7	0.6	44.7	6.0	50.7
1945	100.0	0.0	51.4	50.8	0.6	41.7	6.9	48.6
1946	100.0	0.1	57.2	56.9	0.6	37.3	5.4	42.7
1947	100.0	0.2	47.2	46.9	0.3	46.0	6.6	52.6
1948	100.0	0.0	56.6	56.5	0.1	36.0	7.4	43.4
1949[a]	100.0	0.3	48.2	48.0	0.2	43.5	8.0	51.5

[a] Preliminary unofficial estimates for 1949 based on more complete utilization data than available when latest official production estimates as of December 1, 1949 were made.

Source: Computed by S. W. Shear, Giannini Foundation of Agricultural Economics, March 1950, from tonnage data in companion table from reports of the California Crop Reporting Service, except segregation of juice and table stock in all years, commercial crush in most years, and harvested production in 1927 and 1929 partly estimated by S. W. Shear.

APPENDIX TABLE 33
CALIFORNIA PRODUCTION AND UTILIZATION OF WINE GRAPE VARIETIES
1927 - 1949

Crop Year	Harvested Production[a]/[b]/	Dried[b]/	Used Fresh for Juice[b]/				
			Total	Commercial Crush	Other		
					Total	Inter-State	Within State
	1	2	3	4	5	6	7
	Short Tons, Fresh Weight						
Averages:							
1927-1929	459,700	11,700	448,000	33,100	414,900	376,000	38.900
1930-1932	371,700	7,200	364,500	36,500	328,000	269,300	58,700
1942-1944	537,300	100	537,200	432,900	104,300	98,300	6,000
1945-1948	610,000	1,800	608,200	499,200	109,000	104,000	5,000
Annual:							
1927	487,000	10,000	477,000	29,000	448,000	412,000	36,000
1928	464,000	12,000	452,000	47,200	404,800	367,000	37,800
1929	428,000	13,000	415,000	23,000	392,000	349,000	43,000
1930	446,000	7,100	438,900	23,400	415,500	357,000	58,500
1931	306,000	12,400	293,600	26,000	267,600	208,000	59,600
1932	363,000	2,000	361,000	60,000	301,000	243,000	58,000
1933	402,000	800	401,200	242,000	159,200	125,800	33,400
1934	474,000	2,000	472,000	299,000	173,000	146,000	27,000
1935	569,000	400	568,600	390,000	178,600	159,900	18,700
1936	472,000	200	471,800	322,000	149,800	129,500	20,300
1937	609,000	200	608,800	444,000	164,800	153,500	11,300
1938	639,000	2,000	637,000	493,400	143,600	126,400	17,200
1939	522,000	600	521,400	348,000	173,400	161,000	12,400
1940	517,000	600	516,400	351,000	165,400	154,300	11,100
1941	549,000	200	548,800	383,000	165,800	157,000	8,800
1942	474,000	400	473,600	326,200	147,400	139,300	8,100
1943	575,000	0	575,000	518,500	56,500	51,000	5,500
1944	563,000	0	563,000	454,000	109,000	104,700	4,300
1945	619,000	5,200	613,800	498,000	115,800	110,600	5,200
1946	684,000	0	684,000	580,500	103,500	99,500	4,000
1947	517,000	0	517,000	401,000	116,000	109,700	6,300
1948	620,000	2,000	618,000	517,300	100,700	96,200	4,500
1949[c]/	537,000	0	537,000	447,500	89,500	85,000	4,500

[a]/ Excludes unharvested tonnages: 1928, 18,000; 1930, 40,000; 1931, 10,000; and 1932, 25,000.

[b]/ Chief wine varieties included by the Crop Reporting Service according to the most usual use are Zinfandel, Alicante Bouschet, Carignane, Petite Sirah, Mission, Mataro, Grenache, Golden Chasseles, Burger, Colombar, and Franken Riesling. Presumably all California grapes so classified as strictly wine varieties, including those dried, are crushed commercially or otherwise used for wine, brandy, and other juice purposes and practically none consumed for fresh table use.

[c]/ Preliminary estimates for 1949 based on more complete utilization data than available when latest official preliminary production estimates as of December 1, 1949 were made.

Source: Compiled by S. W. Shear, Giannini Foundation of Agricultural Economics, University of California, March 1950, from reports of California Crop Reporting Service, except commercial crush before 1933 partly estimated by S. W. Shear.

APPENDIX TABLE 34

CALIFORNIA UTILIZATION OF WINE GRAPE VARIETIES: PER CENT OF HARVESTED PRODUCTION, 1927-1949

Crop Year	Harvested Production	Dried	Used Fresh for Juice				
			Total	Commercial Crush	Other		
					Total	Inter-State	Within State
	1	2	3	4	5	6	7
	Per Cent of Harvested Production						
Averages:							
1927-1929	100.0	2.5	97.5	7.2	90.3	81.8	8.5
1930-1932	100.0	1.9	98.1	9.8	88.3	72.5	15.8
1942-1944	100.0	0.0	100.0	79.9	20.1	19.0	1.1
1945-1948	100.0	0.2	99.8	81.2	18.6	17.7	0.9
Annual:							
1927	100.0	2.1	97.9	5.9	92.0	84.6	7.4
1928	100.0	2.6	97.4	10.2	87.2	79.1	8.1
1929	100.0	3.0	97.0	5.4	91.6	81.5	10.1
1930	100.0	1.6	98.4	5.2	93.2	80.1	13.1
1931	100.0	4.1	95.9	8.5	87.4	68.0	19.4
1932	100.0	0.6	99.4	16.5	82.9	66.9	16.0
1933	100.0	0.2	99.8	60.2	39.6	31.3	8.3
1934	100.0	0.4	99.6	63.1	36.5	30.8	5.7
1935	100.0	0.1	99.9	68.5	31.4	28.1	3.3
1936	100.0	0.1	99.9	68.2	31.7	27.4	4.3
1937	100.0	0.0	100.0	72.9	27.1	25.2	1.9
1938	100.0	0.3	99.7	77.2	22.5	19.8	2.7
1939	100.0	0.1	99.9	66.7	33.2	30.8	2.4
1940	100.0	0.1	99.9	67.9	32.0	29.9	2.1
1941	100.0	0.0	100.0	69.8	30.2	28.6	1.6
1942	100.0	0.1	99.9	68.8	31.1	29.4	1.7
1943	100.0	0.0	100.0	90.2	9.8	8.9	0.9
1944	100.0	0.0	100.0	80.6	19.4	18.6	0.8
1945	100.0	0.8	99.2	80.5	18.7	17.9	0.8
1946	100.0	0.0	100.0	84.9	15.1	14.5	0.6
1947	100.0	0.0	100.0	77.6	22.4	21.2	1.2
1948	100.0	0.3	99.7	83.5	16.2	15.5	0.7
1949[a]	100.0	0.0	100.0	83.3	16.7	15.8	0.9

[a] Preliminary unofficial estimates for 1949 based on more complete utilization data than available when official preliminary production estimates as of December 1, 1949 were made.

Source: Computed from tonnage data in companion table from reports of the California Crop Reporting Service, except commercial crush type before 1933 partly estimated by S. W. Shear.

APPENDIX TABLE 35

CALIFORNIA GRAPE UTILIZATION BY VARIETAL CLASSES AND BY CHIEF RAISIN AND TABLE VARIETIES

AVERAGE 1945-1948

Varietal Class and Variety	Harvested Production, Total	Shipped Fresh, Table Use Total	Processed or for Processing						Shipped Fresh For Table Use	
			Total	For Drying	For Processing, Not Dried					
					Total[a]	For Wine, Brandy and Juice				
						Total	Commercial Crush	Shipped Fresh[b]	Out of State	In State
	1	2	3	4	5	6	7	8	9	10
	Tons, Fresh Weight									
1. All varieties	2,826,000	399,000	2,427,000	965,000	1,462,000	1,442,000	1,293,000	149,000	339,000	60,000
2. Wine	610,000	0	610,000	2,000	608,000	608,000	499,000	109,000[b]	0	0
3. Raisin & table	2,216,000	399,000	1,817,000	963,000	854,000	834,000	794,000	40,000	339,000	60,000
4. Raisin	1,627,000	123,000	1,504,000	963,000	541,000	521,000	483,000	38,000	101,000	22,000
5. Table	589,000	276,000	313,000	--[c]	313,000	313,000	311,000	2,000	238,000	38,000
6. Raisin	1,627,000	123,000	1,504,000	963,000	541,000	521,000	483,000	38,000	101,000	22,000
7. Muscat	236,000	7,000	229,000	47,000	182,000	182,000	144,000	38,000	1,000	6,000
8. Seedless	1,391,000	116,000	1,275,000	916,000	359,000	339,000	339,000	0	100,000	16,000
9. Thompson	1,341,000	116,000	1,225,000	887,000	338,000	318,000	318,000	0	100,000	16,000
10. Sultana	34,000	0	34,000	13,000	21,000	21,000	21,000	0	0	0
11. Other	16,000	0	16,000	16,000	--	--	--	0	0	0
12. Table	589,000	276,000	313,000	--	313,000	313,000	311,000	2,000	238,000	38,000
13. Tokay	238,000	75,000	163,000	0	163,000	163,000	163,000	0	64,000	11,000
14. Emperor	175,000	133,000	42,000	0	42,000	42,000	42,000	0	122,000	11,000
15. Other	176,000	68,000	108,000	--	108,000	108,000	106,000	2,000	52,000	16,000

[a] "Processing, not dried", column 5, lines 1, 3, 4, 6, 8 and 9 include 20,000 tons of Thompson Seedless used for canning.

[b] Shipped fresh for juice, column 8, lines 1 and 2 was all shipped out of the state except 5,000 tons of wine varieties to in-state markets.

[c] Dashes indicate less than 500 tons.

Source: Compiled by S. W. Shear, Giannini Foundation of Agricultural Economics, University of California, Berkeley, December 1949, from official and best unofficial data involving some conversions, estimates and adjustments. Lines 1-6 and 12 calculated from official reports of the California Crop and Livestock Reporting Service. Varietal breakdown in other lines as follows:

Col. 7, from reports of the Wine Institute.

Col. 4, from reports of the Dried Fruit Association of California.

Cols. 8 and 9, largely from Market News Reports.

Col. 10, approximate estimates.

APPENDIX TABLE 36

CALIFORNIA GRAPE UTILIZATION BY VARIETAL CLASSES AND BY CHIEF RAISIN AND TABLE VARIETIES: PER CENT OF TOTAL PRODUCTION OF EACH VARIETY BY USE, AVERAGE 1945-1948

Varietal Class and Variety	Harvested Production, Total	Shipped Fresh, Table Use, Total	Processed or for processing						Shipped Fresh For Table Use	
					For processing, not dried					
						For wine, brandy & juice				
			Total	For Drying	Total[a]	Total	Commercial Crush	Shipped Fresh[b]	Out of State	In State
	1	2	3	4	5	6	7	8	9	10
	Per Cent of Total Production of Each Variety by Use									
1. All varieties	100.0	14.1	85.9	34.2	51.7	51.0	45.7	5.3	12.0	2.1
2. Wine	100.0	0.0	100.0	0.3	99.7	99.7	81.8	17.9	0.0	0.0
3. Raisin & Table	100.0	18.0	82.0	43.5	38.5	37.6	35.8	1.8	15.3	2.7
4. Raisin	100.0	7.5	92.4	59.2	33.2	32.0	29.7	2.3	6.2	1.4
5. Table	100.0	46.9	53.1	--[c]	53.1	53.1	52.8	0.3	40.4	6.5
6. Raisin	100.0	7.6	92.4	59.2	33.2	32.0	29.7	2.3	6.2	1.4
7. Muscat	100.0	3.0	97.0	19.9	77.1	77.1	61.0	16.1	0.4	2.6
8. Seedless	100.0	8.3	91.7	65.9	25.8	24.4	24.4	0.0	7.2	1.1
9. Thompson	100.0	8.7	91.3	66.1	25.2	23.7	23.7	0.0	7.5	1.2
10. Sultana	100.0	0.0	100.0	38.2	61.8	61.8	61.8	0.0	0.0	0.0
11. Other	100.0	0.0	100.0	100.0	--	--	--	0.0	0.0	0.0
12. Table	100.0	46.9	53.1	--	53.1	53.1	52.8	0.3	40.4	6.5
13. Tokay	100.0	31.5	68.5	0.0	68.5	68.5	68.5	0.0	26.9	4.6
14. Emperor	100.0	76.0	24.0	0.0	24.0	24.0	24.0	0.0	69.7	6.3
15. Other	100.0	38.6	61.4	--	61.4	61.4	60.2	1.2	29.5	9.1

a/ The 20,000 tons of Thompson Seedless canned included in column 5, lines 1, 3, 4, 6, 8 and 9, constitute 0.7 per cent of production of all varieties; 0.9 per cent of production of raisin and table varieties combined; 1.2 per cent of production of raisin varieties and 1.5 per cent of Thompson Seedless production.

b/ The 5,000 tons of wine varieties shipped fresh to in-state markets included in column 8, lines 1 and 2, were 0.2 per cent of the harvested production of all varieties and 8.2 per cent of harvested production of wine varieties.

c/ Less than 0.05 per cent.

Source: Compiled by S. W. Shear, Giannini Foundation of Agricultural Economics, University of California, Berkeley, December 1949. Computed from tonnage data in companion table 1.

APPENDIX TABLE 37

CALIFORNIA GRAPE UTILIZATION BY VARIETAL CLASSES AND BY CHIEF RAISIN AND TABLE VARIETIES: PER CENT OF TOTALS OF EACH USE BY VARIETY, AVERAGE 1945-1948

Varietal Class and Variety	Harvested Production, Total	Shipped Fresh, Table Use, Total	Processed or for Processing						Shipped Fresh For Table Use	
					For Processing, Not Dried					
						For Wine, Brandy and Juice				
			Total	For Drying	Total[a]	Total	Commercial Crush	Shipped Fresh[b]	Out of State	In State
	1	2	3	4	5	6	7	8	9	10
	Per Cent of Totals of Each Use by Variety									
1. All Varieties	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
2. Wine	21.6	0.0	25.1	0.2	41.6	42.2	38.6	73.2[c]	0.0	0.0
3. Raisin & Table	78.4	100.0	74.9	99.8	58.4	57.8	61.4	26.8	100.0	100.0
4. Raisin	57.6	30.8	62.0	99.8	37.0	35.1	37.3	25.5	29.8	36.7
5. Table	20.8	69.2	12.9	--[d]	21.4	21.7	24.1	1.3	70.2	63.3
6. Raisin	57.6	30.8	62.0	99.8	37.0	36.1	37.3	25.5	29.8	36.7
7. Muscat	8.4	1.7	9.4	4.9	12.4	12.6	11.1	25.5	0.3	10.0
8. Seedless	49.2	29.1	52.6	94.9	24.6	23.5	26.2	0.0	29.5	26.7
9. Thompson	47.4	29.1	50.5	91.9	23.1	22.0	24.6	0.0	29.5	26.7
10. Sultana	1.2	0.0	1.4	1.3	1.5	1.5	1.6	0.0	0.0	0.0
11. Other	0.6	0.0	0.7	1.7	--	--	--	0.0	0.0	0.0
12. Table	20.8	69.2	12.9	--	21.4	21.7	24.1	1.3	70.2	63.3
13. Tokay	8.4	18.8	6.7	0.0	11.1	11.3	12.6	0.0	18.9	18.3
14. Emperor	6.2	33.3	1.7	0.0	2.9	2.9	3.3	0.0	36.0	18.3
15. Other	6.2	17.1	4.5	--	7.4	7.5	8.2	1.3	15.3	26.7

[a] Of the tonnages used for processing not dried (column 5, lines 1, 3, 4, 6, 8 and 9) the 20,000 tons of Thompson Seedless canned constitute 1.4 per cent of all varieties so used; 2.3 per cent of the combined total of raisin and table varieties so used; 3.7 per cent of raisin varieties so used and 5.9 per cent of Thompson Seedless so used.

[b] Of the total shipped fresh for juice (column 8, lines 1 and 2) 4.6 per cent went to California markets and 95.4 per cent to out-of-state markets.

[c] Wine varieties shipped fresh to in-state markets were 3.4 per cent of total fresh shipments to all markets for juice.

[d] Dashes indicate less than 0.05 per cent.

Source: Compiled by S. W. Shear, Giannini Foundation of Agricultural Economics, University of California, Berkeley, December 1949. Computed from basic tonnage data in companion table 1.

APPENDIX TABLE 38

CALIFORNIA GRAPE UTILIZATION BY VARIETAL CLASSES AND BY CHIEF RAISIN AND TABLE VARIETIES: PER CENT BY VARIETY OF TOTAL OF EACH USE OF RAISIN VARIETIES AND OF TABLE VARIETIES, AVERAGE 1945-1948

Varietal Class and Variety	Harvested Production, Total	Shipped Fresh, Table Use, Total	Processed or for Processing						Shipped Fresh For Table Use	
					For Processing, Not Dried					
						For Wine, Brandy and Juice				
			Total	For Drying	Total	Total	Commercial Crush	Shipped Fresh	Out of State	In State
	1	2	3	4	5	6	7	8	9	10
	Per Cent of Total of Each Use of Raisin Varieties by Variety									
1. Raisin	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
2. Muscat	14.5	5.7	15.2	4.9	33.6	34.9	29.8	100.0	1.0	27.3
3. Seedless	85.5	94.3	84.8	95.1	66.4	65.1	70.2	0.0	99.0	72.7
4. Thompson	82.4	94.3	81.4	92.1	62.5 a/	61.1	65.8	0.0	99.0	72.7
5. Sultana	2.1	0.0	2.3	1.3	3.9	4.0	4.4	0.0	0.0	0.0
6. Other	1.0	0.0	1.1	1.7	-- b/	--	--	0.0	0.0	0.0
	Per Cent of Total of Each Use of Table Varieties by Variety									
7. Table	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
8. Tokay	40.4	27.2	52.1	0.0	52.1	52.1	52.4	0.0	26.9	28.9
9. Emperor	29.7	48.2	13.4	0.0	13.4	13.4	13.5	0.0	51.3	29.0
10. Other	29.9	24.6	34.5	--	34.5	34.5	34.1	100.0	21.8	42.1

a/ Of the tonnages used "for processing, not dried" (column 5, lines 1, 3 and 4) the 20,000 tons of Thompson Seedless canned constitute 3.7 per cent of all raisin varieties so used; 5.6 per cent of all seedless varieties so used; and 5.9 per cent of Thompson Seedless so used.

b/ Dashes indicate less than 0.05 per cent.

Source: Compiled by S. W. Shear, Giannini Foundation of Agricultural Economics, University of California, Berkeley, December 1949. Computed from basic tonnage data in companion table 1.

APPENDIX TABLE 39

FRESH GRAPES USED AS TABLE FRUIT: UNITED STATES PRODUCTION, EXPORTS, IMPORTS AND CONSUMPTION, 1934 — 1948

Years Beginning July 1	United States Production Not Commercially processed					Consumed Fresh as Table Grapes						United States Population Dec. 31d/
									United States Consumptiona/ b/			
	Sales to Fresh Market	Farm Home Use	Fresh Sales and Farm Home Use	California Grapes for Homemade Wine	Fresh Table Use Onlya/	Exports to Foreign Countries	Production Not Exported	Imports From Abroadc/	Total		Per Capita	
	1	2	3	4	5	6	7	8	9	10	11	12
			(1 + 2)		(3 - 4)		(5 - 6)		(7 + 8)			
	Short Tons of 2,000 Pounds									1,000 lbs.	lbs.	1,000's
Averages:												
1934-1938	623,107	42,790	665,897	209,940	455,957	26,907	429,050	6,277	435,327	870,327	6.78	128,564,116
1945-1948	581,965	28,298	610,263	150,775	459,488	37,426	422,897	7,907	430,804	861,608	6.0	142,804,000
Annual:												
1934	633,146	48,090	682,236	209,200	473,036	17,856	455,180	4,618	459,798	919,596	7.25	126,864,958
1935	671,196	47,690	718,886	236,100	482,786	18,676	464,110	6,684	470,794	941,588	7.37	127,719,716
1936	576,286	39,290	615,576	193,300	422,276	23,058	399,218	6,978	406,196	812,392	6.32	128,474,994
1937	683,914	45,420	729,334	225,100	504,234	35,014	469,220	6,466	475,686	951,372	7.35	129,354,587
1938	550,992	32,460	583,452	186,000	397,452	39,928	357,524	6,639	364,163	728,326	5.59	130,406,323
1939	601,150	39,350	640,500	222,800	417,700	29,980	387,720	5,700	393,420	786,840	5.99	131,456,245
1940	633,250	36,720	669,970	227,200	442,770	30,523	412,247	5,112	417,359	834,718	6.30	132,560,843
1941	623,500	34,750	658,250	218,100	440,150	32,102	408,048	5,058	413,106	826,212	6.18	133,688,443
1942	593,730	36,970	630,750	202,400	428,350	22,026	406,324	2,326	408,650	817,300	6.10	134,041,664
1943	425,620	31,760	457,380	61,500	395,880	23,752	372,128	1,054	373,182	746,364	5.59	133,580,283
1944	454,860	37,050	491,910	130,000	361,910	22,402	339,508	4,145	343,653	687,306	5.22	131,733,291
1945	525,260	26,590	551,850	149,800	402,050	29,066	372,984	6,158	379,142	758,284	5.54	136,845,000
1946	559,650	32,800	592,450	140,300	452,150	36,091	416,059	10,372	426,431	852,862	6.01	141,915,000
1947	659,150	27,100	686,250	163,000	523,250	47,186	476,064	7,171	483,235	966,470	6.67	144,948,000
1948	577,440	27,700	605,140	141,300	463,840	37,359	426,481	7,927	434,408	868,816	5.89	147,551,000

a/ Data given on consumption for fresh table use only includes the small but unknown quantity of sales of fresh grapes grown in states other than California used for home-made wine.

b/ Because of lack of readily available data, the small shipments to non-contiguous territories are excluded from exports in col. 6 and included in consumption in cols. 9, 10, and 11. During 1930-1940 these varied from 600 to 1,200 tons a year or a little over .01 per cent of total U. S. consumption as shown.

c/ Imports for consumption only except general imports January through December 1947. However, the two are practically the same for twelve-month periods beginning July 1. Cubic feet converted to pounds by multiplying by following factors: Argentina and Chile, 36; Spain, 24; Belgium, 10; Italy and Canada, 40; Union of South Africa, 16; all others, 20.

d/ Population of continental United States includes armed forces at home and abroad except those normally outside continental United States who are estimated on the basis of the numbers stationed abroad at census dates; war years 1941-1948 exclude armed forces serving abroad but include those stationed in the states. All years exclude population of non-contiguous territories.

Source: Compiled by S. W. Shear, Giannini Foundation of Agricultural Economics, University of California, Berkeley, March 1950. Very largely from official data of the U. S. Department of Agriculture and the U. S. Department of Commerce.

APPENDIX TABLE 40

CALIFORNIA INTERSTATE RAIL SHIPMENTS OF TABLE GRAPE STOCK BY VARIETIES, SEASONS 1927-1949

Crop Year[a]	Total of Varieties Listed			Thompson Seedless	Table Varieties								
	Table and Juice	Juice Stock[a]	Table Stock		Total	Malaga	Tokay	Red Malaga	Ribier [b]	Cornichon	Almeria[b]	Emperor[b]	Other[a]
	1	2	3	4	5	6	7	8	9	10	11	12	13
	Number of Cars[c]												
1927	27,714	2,118	25,596	4,882	20,714	7,054	6,811	116	--[d]	689	113	5,202	629
1928	28,326	1,885	26,441	4,049	22,392	7,044	7,445	133	--	618	249	6,247	656
1929	23,007	2,802	20,205	5,036	15,169	4,679	5,440	225	--	374	142	3,520	789
1930	25,218	2,755	22,463	4,707	17,756	4,186	7,670	202	203	342	177	4,630	346
1931	18,059	2,109	15,950	3,128	12,822	3,895	3,978	342	227	210	123	3,805	242
1932	15,498	287	15,211	3,980	11,231	2,173	3,982	402	289	158	112	3,860	255
1933	13,861	238	13,623	3,285	10,338	1,967	4,024	289	175	94	68	3,530	191
1934	16,003	771	15,232	4,169	11,063	2,261	3,792	593	292	118	44	3,780	183
1935	14,545	90	14,455	4,459	9,996	1,764	3,478	765	340	129	81	3,291	148
1936	17,728	556	17,172	4,946	12,226	1,987	4,265	594	341	183	106	4,579	171
1937	18,497	178	18,319	5,862	12,457	1,691	4,273	840	359	186	128	4,703	277
1938	17,331	232	17,099	5,424	11,675	1,447	4,304	662	343	173	162	4,402	182
1939	17,055	334	16,721	5,057	11,664	896	4,202	542	317	143	223	4,965	376
1940	19,760	167	19,573	5,763	13,810	1,428	5,183	719	312	109	89	5,664	306
1941	19,580	160	19,420	6,475	12,945	873	4,098	725	440	137	278	6,163	219
1942	17,969	202	17,767	5,769	11,998	899	3,931	521	567	102	210	5,705	63
1943	18,841	47	18,794	385	18,409	2,243	5,088	1,450	818	79	290	8,273	168
1944	15,578	308	15,270	697	14,573	1,563	4,379	1,266	765	133	117	6,128	222
1945	18,890	192	18,698	5,109	13,589	1,568	3,102	815	654	137	334	6,609	370
1946	20,971	114	20,857	5,754	15,092	689	4,593	1,493	811	150	363	6,820	184
1947	24,316	90	24,226	6,785	17,441	670	5,134	1,254	657	125	145	9,370	86
1948	20,441	44	20,397	7,523	12,874	252	3,138	794	570	78	291	7,708	43
1949[e]	19,289	70	19,219	6,052	13,167	173	4,022	468	530	50	400	7,500	24

[a] "Other" varieties are nearly all unspecified but include a few Black Prince and Rose of Peru. "Other" in earlier years probably include some shipments of listed varieties not as completely segregated as in recent years. Juice stock shipments are not included in cols. 3-13 for varieties listed but shown only in total in col. 2.

[b] Includes season's shipments after December 31 for years beginning 1927 for Emperors, 1935 for Almeria, and 1941 for Ribier and all varieties 1946.

[c] Net carload weights, except for ten-ton loads from desert valleys in southern California, were approximately as follows: 1927, 13.6; 1928, 13.9; 1929, 14.0; 1930-1931, 12.5; 1932-1933, 12.0; 1934-1940, 14.0; 1941-1949, 15.4. Carloads of juice stock are heavier than that of table stock.

[d] Dashes indicate if any included in "other".

[e] Preliminary data for 1949 involving estimated shipments after April 15 for Ribier, Almeria and Emperor.

Source: Compiled by S. W. Shear, Giannini Foundation of Agricultural Economics, University of California, Berkeley, April 1950 from latest reports of California Federal-State Market News Service on Interstate Rail Passings of California Deciduous Tree Fruits and Grapes except shipments after December 31 for seasons before 1940 are approximate estimates by S. W. Shear: 1927-1934 from delivered auction sales; 1935-1939 from California cold storage holdings as of December 31; 1940-1945, passings of all varieties after December 31 prorated by December 31 cold storage holdings by variety. Beginning 1946 the Market News Service reports rail passings by variety after December 31. Carlot rail passing out of California by freight and express loads of 5 tons or more. Data exclude water shipments from California and the increasingly significant truck movement of recent years. (For basic data 1936-1948 and notes on them see table 9, p. 24 of Federal-State Market News Service, Marketing California Grapes and Raisins 1948 season. July 1[illegible])

APPENDIX TABLE 41

GRAPES FRESH: UNITED STATES EXPORTS BY CHIEF COUNTRIES OF DESTINATION YEARS BEGINNING JULY 1
AVERAGES 1924-1945, ANNUAL 1939-1948

	Averages				Annual for 12 months beginning July 1									
Destination	1924-1928a/	1930-1933	1934-1938	1941-1945	1939	1940	1941	1942	1943	1944	1945	1946	1947	1948
	1	2	3	4	5	6	7	8	9	10	11	12	13	14
	Declared Net Export Weight, Short Tons of 2,000 Pounds													
Grand Total	16,782	16,682	26,906	25,870	29,980	30,523	32,102	22,026	23,752	22,402	29,066	36,091	47,175	37,359
Europe, Total	166	1,576	8,297	3	4,172	108	9	0	0	0	3	1,585	b/	c/
United Kingdom	127	1,394	7,116	2	2,661	86	9	0	0	0	0	1,300	--	c/
Other	39	182	1,181	1	1,511	22	0	0	0	0	3	285	--	--
Ireland	0	--b/	--	--	--	--	0	0	0	0	--	--	--	--
France	1	c/	14	--	0	0	0	0	0	0	--	--	--	--
Germany	11	20	46	--	0	0	0	0	0	0	--	--	--	--
Netherlands	6	13	35	--	0	0	0	0	0	0	--	--	--	--
Belgium	0	4	c/	--	0	0	0	0	0	0	--	--	--	--
Sweden	21	121	517	--	737	0	0	0	0	0	--	285	--	--
Norway	c/	17	292	--	762	0	0	0	0	0	--	--	--	--
Denmark	c/	5	2	--	0	0	0	0	0	0	--	--	--	--
Finland	0	2	266	--	8	0	0	0	0	0	--	--	--	--
Switzerland	0	--	--	--		--	0	0	0	0	--	--	--	--
Other	c/	c/	9	1	4	22	0	0	0	0	3	--	--	--
Except Europe	16,616	15,106	18,609	25,867	25,808	30,415	32,093	22,026	23,752	22,402	29,063	34,506	47,176	37,359
Canada	11,724	10,666	11,970	21,147	15,567	20,594	22,105	17,756	20,805	19,767	25,304	25,638	23,845	24,734
Other	4,892	4,440	6,639	4,720	10,241	9,821	9,988	4,270	2,947	2,635	3,759	8,868	23,331	12,625
Newfoundland and Labrador	28	--	--	--	--	--	--	--	--	--	--	98	145	129
Latin America	3,901	2,298	3,206	4,261	7,165	7,926	8,375	4,162	2,752	2,426	3,592	6,969	12,008	8,165
Mexico	1,140	630	1,001	2,569	4,046	3,896	3,656	3,472	2,293	1,621	1,802	3,328	3,078	1,080
Cuba	2,302	944	994	697	1,024	1,104	1,305	244	218	604	1,116	1,258	2,140	2,246
Brazil	10	48	503	457	992	1,567	1,984	24	0	14	264	1,476	1,759	883
Other	449	676	708	538	1,103	1,359	1,430	422	241	187	410	907	5,031	3,956
Phillippines	490	865	960	113	1,134	796	564	0	0	0	0	1,270	8,895	3,241
New Zealand	89	200	368	--	354	--	--	--	--	--	--	2	--	--
Other	384	1,077	2,105	346	1,588	1,099	1,049	108	195	209	167	529	2,283	1,090

a/ Calendar years, as July 1 year exports by destination not published.
b/ Dashes indicate data not segregated. If any, probably included in "other".
c/ Less than a ton.

Source: Compiled by S. W. Shear, Giannini Foundation of Agricultural Economics, University of California, Berkeley, April 1950, from official data of U. S. Dept. Commerce, directly from its publications or indirectly from publications of the U. S. Dept. of Agriculture.

APPENDIX TABLE 42

GROWER PRICES: CALIFORNIA GRAPES AND UNITED STATES ALL COMMODITIES, AVERAGE 1935-1939, ANNUAL 1946-1949

PRICES RECEIVED BY CALIFORNIA GROWERS	Average 1935-1939	Crop Years			
		1946	1947	1948	1949
	Dollars Per Ton, Fresh Basis[a]				
Dried Raisins	14	82	33	34	31
Crush, All Commercial	14	91	30	30	27
Wine Varieties Shipped Fresh	17	100	35	36	30
Table Varieties Shipped Fresh	25	117	63	53	39
All Grapes, All Uses	16	91	36	36	32
	Per Cent of 1935-1939 = 100				
All Grapes, All Uses	100	569	225	225	200
Dried Raisins	100	586	236	243	221
Crush, All Commercial	100	650	214	214	193
Wine Varieties Shipped Fresh	100	588	206	212	176
Table Varieties Shipped Fresh	100	468	252	212	156
UNITED STATES GROWER PRICES[b]					
Prices Received, All Commodities	100	250	272	246	224
Prices Paid, All Commodities	100	186	210	207	198
Farm Wage Rates	100	334	356	362	353[c]

a/ Growers' returns per equivalent fresh tons for naked fruit first delivery point.

b/ United States relatives of prices received and prices paid by growers are simple averages of data for 12 months beginning September, except data for 1949 are simple averages for 4 months September 1949 through January 1950.

c/ Two-month average October 1949 and January 1950.

Source: Compiled by S. W. Shear, Giannini Foundation of Agricultural Economics, University of California, March 1950, from official data of the California Crop and Livestock Reporting Service and the U. S. Bureau of Agricultural Economics.

APPENDIX TABLE 43

CALIFORNIA GRAPES: GROWERS' TOTAL EQUIVALENT RETURNS FOR NAKED FRUIT AT FIRST DELIVERY POINT BY VARIETAL CLASSES, 1919—1949

Crop Year	Total	Varietal Class[a]				
		Wine	Table	Raisin		
				Total	Marketed fresh	Dried
	1	2	3	4	5	6
	Thousands of dollars[b]					
1919	73,675	19,800	15,300	38,575	1,720	36,855
1920	86,705	25,350	15,225	46,130	2,320	43,810
1921	66,588	25,748	14,880	25,960	3,480	22,480
1922	60,990	27,560	13,140	20,290	4,050	16,240
1923	45,285	15,400	12,200	17,685	3,260	14,425
1924	48,296	19,215	14,640	14,441	3,920	10,521
1925	55,960	26,520	6,300	23,100	7,580	15,520
1926	49,030	18,540	8,500	21,990	4,440	17,550
1927	54,680	21,915	8,788	23,977	6,877	17,100
1928	35,538	11,600	10,478	13,460	3,020	10,440
1929	43,465	14,980	10,710	17,775	4,660	13,115
1930	33,650	8,920	6,541	18,189	6,861	11,328
1931	26,503	5,814	8,084	12,605	2,465	10,140
1932	20,765	4,356	3,344	13,065	2,847	10,218
1933	26,683	7,940	3,952	14,791	3,598	11,193
1934	29,788	6,968	6,956	15,864	4,920	10,944
1935	28,365	6,714	5,208	16,443	5,116	11,327
1936	32,735	8,166	8,197	16,372	3,705	12,667
1937	46,606	12,789	9,069	24,748	9,261	15,487
1938	32,463	8,051	7,957	16,455	4,275	12,180
1939	30,470	7,412	5,960	17,098	5,216	11,882
1940	34,831	8,530	7,498	18,803	8,953	9,850
1941	57,036	12,133	12,821	32,082	14,212	17,870
1942	72,187	14,789	18,282	39,116	10,414	28,702
1943	169,363	44,792	55,079	69,492	3,728	65,764
1944	194,083	62,493	56,430	75,160	13,260	61,900
1945	149,876	38,564	29,696	81,616	32,693	48,923
1946	267,789	71,136	62,055	134,598	74,382	60,216
1947	102,082	17,268	28,272	56,542	16,150	40,392
1948	101,797	22,134	21,016	58,647	28,765	29,882
1949	79,616	15,705	16,017	47,894	13,622	34,272

[a] Chief varieties included in each class by the Crop Reporting Service according to the most usual use are:
Raisin: Thompson Seedless, Muscat, Sultana, and Zante Currant.
Table: Tokay, Malaga, Emperor, Red Malaga, Cornichon, Almeria, and Ribier.
Wine: Zinfandel, Alicante Bouschet, Carignane, Petite Sirah, Mission, Mataro, and several minor black and white varieties.

[b] Includes growers' returns for dried fruit sold in dried form.

Source of data: Compiled by S. W. Shear, Giannini Foundation of Agricultural Economics, University of California, March 1950, from official reports of the California Crop Reporting Service.

APPENDIX TABLE 44

CALIFORNIA GRAPES: SEASON AVERAGE EQUIVALENT RETURNS PER TON TO GROWERS FOR BULK FRUIT AT FIRST DELIVERY POINT BY VARIETAL CLASSES, DOLLARS PER TON AND PERCENT OF 1935-1939= 100, 1919 — 1949

Crop Year	All Varieties	Wine a/ Varieties	Table a/ Varieties	Raisin Varieties a/				All Varieties	Wine Varieties	Table Varieties	Raisin Varieties		
	Sales for All Uses				Not Dried b/	Dried c/		Sales for All Uses				Not Dried	Dried
	Dollars Per Ton Fresh Weight						Per Dry Ton	Per Cent of 1935-1939=100					
	1	2	3	4	5	6	7	8	9	10	11	12	13
Averages:													
1935-1939	15.50	15.38	18.76	14.54	16.62	13.94	55.72	100.	100.	100.	100.	100.	100.
1947-1949	34.37	32.97	37.40	33.77	35.57	32.67	130.67	222.	214.	199.	232.	214.	234.
Annual:													
1919	54.80	50.00	75.00	51.80	40.00	52.50	210.00	354.	325.	400.	356.	241.	377.
1920	68.10	75.00	75.00	63.00	40.00	65.00	260.00	439.	488.	400.	433.	241.	466.
1921	58.00	82.00	80.00	40.00	40.00	40.00	160.00	374.	533.	426.	275.	241.	287.
1922	35.80	65.00	60.00	19.10	30.00	17.50	70.00	231.	423.	320.	131.	180.	126.
1923	22.60	40.00	40.00	13.40	20.00	12.50	50.00	146.	260.	213.	92.	120.	90.
1924	31.50	63.00	40.00	16.70	20.00	15.75	63.00	203.	410.	213.	115.	120.	113.
1925	29.20	60.00	20.00	20.00	20.00	20.00	80.00	188.	390.	107.	138.	120.	144.
1926	23.90	45.00	25.00	16.90	20.00	16.25	65.00	154.	293.	133.	116.	120.	117.
1927	24.20	45.00	26.00	16.70	23.00	15.00	60.00	156.	293.	139.	115.	138.	108.
1928	16.10	25.00	26.00	10.00	10.00	10.00	40.00	104.	162.	139.	69.	60.	72.
1929	23.80	35.00	35.00	16.30	20.00	15.25	61.00	154.	228.	187.	112.	120.	109.
1930	16.30	20.00	20.83	13.90	12.80	14.75	59.00	105.	130.	111.	96.	77.	106.
1931	20.20	19.00	35.30	16.30	24.90	15.00	60.00	130.	124.	188.	112.	150.	108.
1932	11.70	12.00	16.00	10.90	18.73	9.75	39.00	76.	78.	85.	75.	113.	70.
1933	16.10	19.75	14.80	15.00	17.30	14.35	57.40	104.	128.	79.	103.	104.	103.
1934	17.50	14.70	23.50	17.10	20.00	16.00	64.00	113.	96.	125.	118.	120.	115.
1935	12.90	11.80	14.00	13.10	11.60	13.95	55.80	83.	77.	75.	90.	70.	100.
1936	19.10	17.30	25.30	17.80	19.50	17.40	69.60	123.	112.	135.	122.	117.	125.
1937	19.00	21.00	21.80	17.30	21.00	15.68	62.70	123.	136.	116.	119.	126.	112.
1938	12.80	12.60	17.80	11.40	15.00	10.50	42.00	83.	82.	95.	78.	90.	75.
1939	13.70	14.20	14.90	13.10	16.00	12.15	48.50	88.	92.	79.	90.	96.	87.
1940	15.50	16.50	16.30	14.80	15.20	14.40	57.60	100.	107.	87.	102.	91.	103.
1941	22.40	22.10	26.60	21.20	20.90	21.38	85.50	144.	144.	142.	146.	126.	153.
1942	33.40	31.20	44.70	30.60	39.90	28.25	113.00	216.	203.	238.	210.	240.	203.
1943	60.70	77.90	99.60	41.80	65.40	41.00	164.00	392.	506.	531.	288.	394.	294.
1944	77.20	111.00	110.00	52.30	66.30	50.00	200.00	498.	722.	586.	360.	399.	359.
1945	56.50	62.30	58.00	53.70	58.80	50.75	203.00	364.	405.	309.	369.	354.	364.
1946	90.60	104.00	98.50	81.90	85.30	78.00	312.00	584.	678.	525.	563.	513.	560.
1947	36.00	33.40	45.60	33.30	34.00	33.00	132.00	232.	217.	243.	229.	205.	237.
1948	35.60	35.70	35.50	35.70	38.20	33.50	134.00	230.	232.	189.	246.	229.	240.
1949	31.52	29.80	31.10	32.30	34.52	31.50	126.00	203.	194.	166.	222.	208.	226.

a/ See footnote to table 43 for list of varieties included in each varietal class.

b/ Not dried are shipped fresh for table and juice, canned and crushed by California wineries.

c/ Dried price converted to fresh equivalent by dividing by four. Source: Compiled by S. W. Shear, Giannini Foundation of Agricultural Economics, University of California, March 1950, cols. 1-7 from official reports of the United States and California Crop Reporting Services; cols. 8-13 computed.

APPENDIX TABLE 45

CALIFORNIA GRAPES, ALL VARIETIES: EQUIVALENT RETURNS TO GROWERS PER TON FOR BULK FRUIT AT FIRST DELIVERY POINT, BY USE, 1934 — 1949

Crop Year	All Sold[a]	Sales to Fresh Markets			Processed		
		All Fresh	Out-State	In-State	Canned	Dried[a]	Crushed
	1	2	3	4	5	6	7
	Dollars Per Fresh Ton[a]						
1934	17.50	21.40	21.60	20.40	20.00	15.95	16.10
1935	12.90	61.70	16.90	15.00	18.00	13.95	10.00
1936	19.10	23.80	24.00	22.00	25.00	17.40	17.10
1937	19.00	25.60	26.20	20.50	27.00	15.70	18.60
1938	12.80	22.20	22.50	19.80	21.00	10.50	10.60
1939	13.70	17.40	17.60	15.70	15.00	12.10	13.20
1940	15.50	20.90	21.10	19.30	17.90	14.40	13.20
1941	22.40	28.90	29.10	26.70	25.00	21.35	19.90
1942	33.40	47.30	47.60	45.00	34.00	28.25	30.30
1943	60.70	109.00	109.00	110.00	49.00	41.00	77.60
1944	77.20	113.15	113.51	109.58	55.00	50.00	100.00
1945	56.50	71.07	70.20	77.84	62.00	50.77	55.10
1946	90.60	109.47	110.04	104.59	75.00	78.00	90.70
1947	36.00	50.87	50.70	52.23	57.00	32.99	29.80
1948	35.64	52.06	52.95	46.35	48.50	33.51	30.30
1949	31.53	39.47	39.20	41.20	38.70	31.49	26.73

[a] Prices received by growers per dry ton of raisins included on fresh basis at 4 to 1 drying ratio.

Source: Compiled by S. W. Shear, Giannini Foundation of Agricultural Economics, University of California, March 1950, from official data of United States and California Crop Reporting Service.

APPENDIX TABLE 46
CALIFORNIA GRAPES: RETURNS TO GROWERS PER TON BY VARIETAL CLASSES BY TYPE OF UTILIZATION, 1934 — 1949

Crop Year	All Sold	Marketed Fresh		Dried	Crushed
		Interstate	Intrastate		
	1	2	3	4	5
	Dollars Per Fresh Tons[a]				
	Table Varieties[b]				
1934	23.50	27.00	26.20	12.38	17.00
1935	14.00	24.10	17.00	11.00	6.00
1936	25.30	30.80	26.00	13.50	16.20
1937	21.80	28.20	21.00	14.25	16.00
1938	17.80	26.00	23.70	11.00	10.50
1939	14.90	19.20	15.60	11.00	11.00
1940	16.30	22.00	20.00	11.00	11.00
1941	26.60	37.50	28.80	17.80	17.50
1942	44.70	59.00	47.70	25.00	29.70
1943	99.60	113.00	114.00	37.00	82.00
1944	110.00	114.00	105.00	- [b]	107.00
1945	58.00	74.00	79.00	-	42.00
1946	98.50	118.00	106.00	71.00	85.00
1947	45.60	63.00	65.00	26.00	25.70
1948	35.50	53.00	51.00	36.00	22.40
1949	31.10	39.00	39.00	28.50	22.50
	Wine Varieties				
1934	14.70	16.30	14.40	13.75	14.00
1935	11.80	12.50	12.00	11.25	11.50
1936	17.30	17.30	17.30	11.50	17.30
1937	21.00	22.00	21.00	13.50	20.60
1938	12.60	20.00	15.00	11.00	10.60
1939	14.20	15.00	13.90	9.00	13.90
1940	16.50	20.00	15.00	13.00	15.00
1941	22.10	22.30	22.00	18.00	22.00
1942	31.20	33.30	30.00	28.50	30.40
1943	77.90	77.00	78.00	- [b]	78.00
1944	111.00	108.00	112.00	-	112.00
1945	62.30	64.00	62.00	55.00	62.00
1946	104.30	100.00	105.00	-	105.00
1947	33.40	35.00	34.00	-	33.00
1948	35.70	36.00	36.00	36.00	35.70
1949	29.80	30.00	30.00	22.50	29.80
	Raisin Varieties				
1934	17.10	20.00	20.00	16.00	20.00
1935	13.10	14.00	14.00	13.95	10.50
1936	17.80	20.50	19.10	17.40	17.50
1937	17.30	28.00	18.60	15.68	17.20
1938	11.40	20.00	15.00	10.50	10.50
1939	13.10	19.00	17.00	12.12	14.00
1940	14.80	21.00	20.00	14.40	13.00
1941	21.20	25.10	24.00	21.38	19.40
1942	30.60	46.50	44.00	28.25	30.80
1943	41.80	220.00	110.00	41.00	43.50
1944	52.30	130.00	149.00	50.00	54.00
1945	53.70	69.00	79.00	50.75	55.00
1946	81.90	103.00	102.00	78.00	82.00
1947	33.30	39.00	33.00	33.00	29.40
1948	35.70	63.00	40.00	33.50	30.00
1949	32.30	45.00	47.00	31.50	25.30

[a] Season average equivalent returns per ton to growers for bulk fruit at first delivery point.
[b] Dashes indicate no sales.

Source: Compiled by S. W. Shear, Giannini Foundation of Agricultural Economics, University of California, March 1950, from State and California Crop Reporting Service.

APPENDIX TABLE 47

CALIFORNIA GRAPES CRUSHED FOR WINE AND BRANDY: EQUIVALENT RETURNS PER TON TO GROWERS FOR BULK FRUIT AT FIRST DELIVERY POINT BY VARIETAL CLASSES, 1930 — 1949

Crop Year	All Varieties	Varietal Class[a]			All Varieties	Varietal Class[a]		
		Wine	Table	Raisin		Wine	Table	Raisin
	Dollars Per Ton				Per Cent of 1935-1939 = 100			
	1	2	3	4	5	6	7	8
Averages:								
1935-39	13.90	14.78	11.94	13.94	100.	100.	100.	100.
1947-49	28.93	32.83	23.53	28.23	208.	222.	197.	202.
Annual:								
1930	16.80	22.00	14.00	10.15	121.	149.	117.	73.
1931	17.50	17.00	18.00	20.00	126.	115.	151.	144.
1932	6.20	7.00	5.00	5.00	45.	47.	42.	36.
1933	16.40	20.50	8.70	14.40	118.	139.	215.	103.
1934	16.10	14.00	17.00	20.00	116.	95.	142.	144.
1935	10.00	11.50	6.00	10.50	72.	78.	50.	75.
1936	17.10	17.30	16.20	17.50	123.	117.	136.	126.
1937	18.60	20.60	16.00	17.20	134.	139.	134.	123.
1938	10.60	10.60	10.50	10.50	76.	72.	88.	75.
1939	13.20	13.90	11.00	14.00	95.	94.	92.	100.
1940	13.20	15.00	11.00	13.00	95.	102.	92.	93.
1941	19.90	22.00	17.50	19.40	143.	149.	147.	139.
1942	30.30	30.40	29.70	30.80	218.	206.	249.	221.
1943	77.60	78.00	82.00	43.50	558.	528.	687.	312.
1944	100.00	112.00	107.00	54.00	719.	758.	896.	387.
1945	55.09	62.00	42.00	55.00	396.	420.	352.	394.
1946	90.73	105.00	85.00	82.00	653.	710.	712.	588.
1947	29.78	33.00	25.70	29.40	214.	223.	215.	211.
1948	30.29	35.70	22.40	30.00	218.	242.	188.	215.
1949	26.73	29.80	22.50	25.30	192.	202.	188.	182.

a/ For varieties included in each varietal class see footnote to table 43.

Source: Compiled by S. W. Shear, Giannini Foundation of Agricultural Economics, University of California, March 1950, from official data of the United States and California Crop Reporting Service.

APPENDIX TABLE 48

EASTERN DELIVERED AUCTION PRICE PER PACKAGE OF CALIFORNIA TABLE STOCK GRAPES BY CHIEF VARIETITIES, 1926-1949

Crop year a/	All markets (11 or 13)a/b/									New York marketa/		
	Thompson	Malaga	Tokay	Red Malaga	Ribier	Cornichon	Almeria	Emperor	All table stock		Emperor	Except Emperor
	1	2	3	4	5	6	7	8	9	10	11	12
	dollars per packagec/											
1926	1.16	1.18	1.43	--d/	--d/	1.23	--d/	1.38	1.26	1.42	1.47	1.41
1927	1.36	1.22	1.40	--	--	1.17	--	1.15	1.30	1.43	1.53	1.42
1928	1.05	1.17	1.34	1.85	--	1.05	--	1.15	1.19	1.30	1.41	1.28
1929	1.48	1.37	1.42	2.19	--	1.26	--	1.62	1.44	1.56	1.53	1.56
1930	1.31	1.18	1.15	1.79	1.67	0.98	--	1.06	1.22	1.31	1.29	1.31
1931	1.53	1.22	1.59	1.93	1.71	1.26	1.45	1.61	1.44	1.62	1.76	1.60
1932	1.27	0.90	1.10	1.17	1.43	0.94	1.35	1.11	1.13	1.18	1.15	1.19
1933	1.42	1.11	1.18	1.65	1.51	1.10	1.91	1.34	1.29	1.38	1.58	1.34
1934	1.52	1.15	1.34	1.79	1.74	1.29	1.64	1.67	1.43	1.50	1.72	1.47
1935	1.37	1.14	1.14	1.37	1.37	1.04	1.84	1.35	1.27	1.33	1.47	1.31
1936	1.53	1.28	1.37	1.71	1.71	1.36	1.70	1.54	1.47	1.53	1.65	1.50
1937	1.48	1.12	1.19	1.53	1.49	1.18	1.59	1.36	1.36	1.42	1.51	1.40
1938	1.36	1.10	1.15	1.43	1.51	1.07	1.73	1.42	1.30	1.37	1.54	1.33
1939	1.36	1.12	1.11	1.44	1.44	1.11	1.70	1.35	1.28	1.36	1.48	1.33
1940	1.44	1.08	1.17	1.33	1.57	1.13	1.86	1.29	1.31	1.40	1.47	1.38
1941	1.73	1.35	1.43	1.97	1.87	1.43	2.13	1.80	1.66	1.75	1.87	1.72
1942	2.47	1.81	1.99	2.81	2.48	2.03	3.04	2.82	2.39	2.51	3.06	2.38
1943	5.29	2.93	2.89	4.40	3.31	2.45	3.23	3.20	3.35	3.29	3.28	3.29
1944	5.56	3.06	2.59	4.07	3.56	2.72	4.66	4.02	3.72	3.94	4.42	3.69
1945	5.29	2.45	2.31	2.87	2.67	2.40	3.02	2.81	2.68	2.73	2.86	2.68
1946	4.04	2.35	2.75	4.73	3.54	2.60	4.26	3.60	3.64	3.84	4.12	3.75
1947	2.85	1.87	2.02	3.17	2.77	1.81	2.69	2.54	2.61	2.72	2.73	2.72
1948	3.20	2.05	2.11	3.66	3.07	1.97	2.77	2.66	2.87	3.08	3.02	3.10
1949	2.87	2.15	2.02	1.99	2.71	1.98	2.93	2.58	2.64		2.88	

a/ New York market data covers complete season for all years. "All markets" data cover complete seasons 1945-1949 only, through December 31, 1936-1944 through second or third weeks of December 1931-1935, only through first week of November 1926-1930. "All market" prices for Emperor and other late varieties marketed in significant volume after December 15 are therefore too incomplete to be representative of season's average in earlier years. New York prices usually are significantly higher than for other markets; they are included because sales for complete seasons for all years included are available including the increasing large quantities sold after December 31 in recent years usually through February and occasionally a few in March and April. These are largely Emperors, Almeria, and Ribier.

b/ All markets cover sales for 11 markets 1926-1933 and 13 for 1934-1949.

c/ Packages vary somewhat in size and net weight of contents.

d/ Dashes indicate prices not available, presumably almost none of variety marketed in earlier years.

APPENDIX TABLE 49

PRICES PAID BY PACKERS TO GROWERS FOR FREE TONNAGE OF CALIFORNIA SUN-DRIED NATURAL THOMPSON SEEDLESS AND MUSCAT RAISINS, 1909 — 1949

Crop Year	Thompson	Muscat	Crop Year	Thompson	Muscat	Crop Year	Thompson	Muscat
	1	2		1	2		1	2
	Dollars Per Ton			Dollars Per Ton			Dollars Per Ton	
1909	43	33	1923	49	51	1937	61	64
1910	60	55	1924	62	61	1938	50	50
1911	108	75	1925	75	84	1939	45	45
1912	68	62	1926	62	66	1940	55	57
1913	79	70	1927	57	50	1941	84	93
1914	93	67	1928	43	43	1942[a]	110	110
1915	100	73	1929	68	62	1943[a]	155	165
1916	132	85	1930	60	49	1944[a]	180	195
1917	138	97	1931	70	60	1945[b]	210	220
1918	138	106	1932	41	21	1946	310	320
1919	240	208	1933	56	53	1947	125	120
1920	296	223	1934	61	56	1948	130	150
1921	168	146	1935	56	54	1949	137	150
1922	73	54	1936	65	70			

a/ Support prices of A.M.A. and ceiling prices of O.P.A. 1942-1944. Prices actually paid growers averaged slightly higher than ceiling prices shown for 1944. Thompson prices ranged from $180 to $185 a ton in 1944.

b/ Prices paid to growers in 1945 given here exceeded A.M.A. support prices of $205 for natural Muscat and $190 for Natural Thompson Seedless.

Source: Compiled by S. W. Shear, Giannini Foundation of Agricultural Economics, University of California, March 1950. Weighted average prices of free tonnage of natural raisins available to the trade (excluding sales of bleached and of surplus for distilling and other by-products) paid growers by Sun Maid 1913-1924 and by Sun Maid and other packers for other years. Estimates 1932-1949 are preliminary subject to minor revision, based upon Raisin Market Information Bulletins of the Federal-State Market News Service, Sacramento, California, and trade sources.

APPENDIX TABLE 50

RAISINS AND CURRANTS: UNITED STATES EXPORTS BY CHIEF COUNTRIES OF DESTINATION YEARS BEGINNING JULY 1, AVERAGES 1924-1945; ANNUAL 1938-1947

Destination	Averages				Annual, Years Beginning July 1										
	1924-1928	1930-1933	1934-1938	1941-1945	1938	1939	1940	1941	1942	1943	1944	1945	1946	1947	1948
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
	Short Tons, Net Declared Processed Dry Weight														
TOTAL	79,300	56,722	60,985	78,418	76,622	63,386	43,166	50,666	73,579	118,754	93,790	55,303	30,369	139,639	66,435
Europe Total	50,542	42,156	49,222	62,445	66,343	51,644	34,100	39,631	63,368	102,649	73,010	33,570	23,008	108,387	52,738
United Kingdom	25,826	20,808	25,656	59,125	30,018	19,150	30,208	36,715	63,170	102,306	68,871	24,564	16,324	12,126	22,252
Other	24,716	21,348	23,566	3,320	36,325	32,494	3,892	2,916	198	343	4,139	9,006	6,684	96,261	30,486
Ireland	423	1,050	2,052	616	3,032	3,640	2,918	870	0	0	a/	2,211	2,674	0	2,798
France	898	1,844	3,735	39	4,717	549	0	0	0	0	192	1	6	530	36
Germany	8,163	7,719	1,151	6	625	10	0	0	0	0	0	28	10	84,962	19,738
Netherlands	7,480	3,128	4,627	751	8,729	10,811	0	0	0	0	902	2,852	384	142	242
Belgium	1,667	1,046	2,560	562	3,910	2,361	0	0	0	0	1,663	1,148	710	6,406	3,498
Sweden	2,658	4,301	5,040	243	7,356	8,440	536	690	a/	0	a/	526	2,344	50	0
Norway	494	314	1,305	265	2,316	2,602	0	0	0	0	0	1,326	b/	9	1
Denmark	1,174	792	694	1	2,419	1,741	2	6	0	0	0	0	2	54	143
Finland	166	304	974	0	1,602	769	332	0	0	0	0	0	8	22	15
Switzerland	3	32	240	534	676	1,231	90	1,350	0	173	710	436	475	1,034	738
Other	1,590	818	1,188	303	943	340	19	a/	198	170	672	478	71	3,052	3,277
Except Europe	28,758	14,566	11,763	15,973	10,279	11,742	9,066	11,035	10,211	16,105	20,780	21,733	7,361	31,252	13,697
Canada	18,814	7,214	3,444	10,482	2,790	4,524	3,001	3,340	7,144	12,135	15,236	14,534	881	20,044	7,881
Other	9,944	7,352	8,319	5,491	7,489	7,218	6,065	7,695	3,067	3,970	5,524	7,199	6,480	11,208	5,816
Newfoundland & Labrador	324	310	411	1,021	537	833	730	1,340	940	305	1,218	1,303	324	565	702
Latin America	1,925	1,652	1,735	2,039	1,961	2,251	2,242	3,469	634	1,056	2,381	2,656	3,366	5,204	2,558
Mexico	872	327	420	638	504	611	630	698	250	563	502	1,176	1,022	478	639
Cuba	120	111	249	233	310	372	307	388	66	113	404	194	528	216	486
Other	933	1,214	1,066	1,168	1,147	1,268	1,305	2,383	318	380	1,475	1,286	1,816	4,510	1,433
New Zealand	2,709	2,301	1,311	1	1,063	614	60	a/	a/	a/	a/	4	0	1,720	2
Other	4,986	3,089	4,862	2,430	3,928	3,520	3,033	2,886	1,493	2,609	1,925	3,236	2,790	3,719	2,063

a/ Less than one ton.
b/ Dashes indicate not segregated, if any included in "other".

Source: Compiled by S. W. Shear, Giannini Foundation of Agricultural Economics, University of California, April 1950, directly or indirectly from latest revised reports of the U. S. Department of Commerce but largely from compilations of the Office of Foreign Agricultural Relations published in the U. S. Department of Agriculture Annual Agricultural Statistics and latest year from its Foreign Agricultural Trade.

APPENDIX TABLE 51

RAISINS AND CURRANTS: UNITED STATES PRODUCTION, EXPORTS, IMPORTS AND CONSUMPTION

YEARS BEGINNING SEPTEMBER 1, 1921—1948

Years beginning Sept. 1	California Raisins					Raisins		Currants	Raisins and Currants	
			Exports						Consumption	
	Production[a]	Shipments	Quantity	Per cent of Shipments	U.S. Consumption	Imports	Consumption Total	Imports	Total	Per Capita
	1	2	3	4	5 (2-3)	6	7 (5+6)	8	9 (7+8)	10
	Sweat Box[a]	Short tons of 2,000 pounds net processed weight[a]								
Averages:										
1909-13	72,000	- [c]	9,000[b]	12.5[d]	63,000	1,700	64,700	16,000	80,700	1.7
1924-28	237,600	237,000	80,220	33.8	156,780	2,320	159,100	6,120	165,220	2.8
1929-33	206,600	190,000	57,640	30.3	132,360	740	133,100	3,680	136,780	2.2
1934-38	218,600	195,000	60,960	31.0	134,040	320	134,360	2,800	137,160	2.1
Annual:										
1921	145,000	145,000	27,600	19.0	117,400	10,000	127,400	23,900	151,300	2.8
1922	237,000	175,000	50,900	29.1	124,100	5,600	129,700	7,800	137,500	2.5
1923	290,000	180,000	42,200	23.4	137,800	2,700	140,500	9,600	150,100	2.7
1924	170,000	205,000	48,600	23.7	156,400	4,800	161,200	7,300	168,500	2.9
1925	200,000	220,000	66,600	30.3	153,400	3,000	156,400	7,100	163,500	2.8
1926	272,000	225,000	76,600	34.0	148,400	1,600	150,000	6,000	156,000	2.6
1927	285,000	265,000	99,100	37.4	165,900	900	166,800	5,600	172,400	2.9
1928	261,000	270,000	110,200	40.8	159,800	1,300	161,100	4,600	165,700	2.7
1929	215,000	200,000	61,500	30.8	138,500	700	139,200	4,300	143,500	2.3
1930	192,000	200,000	61,800	30.9	138,200	1,200	139,400	4,500	143,900	2.3
1931	169,000	170,000	56,400	33.2	113,600	600	114,200	3,200	117,400	1.9
1932	262,000	205,000	59,900	29.2	145,100	700	145,800	3,300	149,100	2.4
1933	195,000	175,000	48,600	27.8	126,400	500	126,900	3,100	130,000	2.1
1934	171,000	175,000	44,700	25.5	130,300	500	130,800	3,500	134,300	2.1
1935	203,000	200,000	56,400	28.2	143,600	400	144,000	3,000	147,000	2.4
1936	182,000	185,000	54,700	29.6	130,300	300	130,600	3,100	133,700	2.1
1937	247,000	210,000	71,000	33.8	139,000	200	139,200	2,400	141,600	2.2
1938	290,000	210,000	78,000	37.2	132,000	200	132,200	2,000	134,200	2.0
1939	245,000	230,000	57,500	25.0	172,500	100	172,600	1,700	174,300	
1940	171,000	200,000	45,700	22.8	154,300	100	154,400	500	154,900	
1941	209,000	190,000	48,700	25.5	141,300	100	141,400	100	141,500	2.1
1942	254,000	250,000	78,600	31.4	149,300	0	149,300	100	149,400	2.3[f]
1943	401,000	345,000	117,400	34.0	197,400	0	199,400	[e]	197,400	3.0[f]
1944	310,000	320,000	96,400	30.1	197,800	100	197,900	[e]	197,900	3.1[f]
1945	241,000	210,000	49,400	23.5	155,600	0	155,600	[e]	155,600	2.3[f]
1946	193,000	180,000	40,500	22.5	139,500	1,100	140,600	[e]	140,600	2.0
1947	306,000	280,000	146,000	52.0	134,000	0	134,000	[e]	134,000	1.9
1948	232,000	210,000	72,000	34.3	138,000		138,000		138,000	1.9

a/ Production data are to the nearest 1,000 tons, shipments, col. 2 to the nearest 5,000 tons, and exports and imports to the nearest 100 tons. Production is sweat-box or natural condition weight, all other data are net processed weight and differ from following table 51 which gives shipments in equivalent sweat-box weight.

b/ Exports and imports for 1909-1913 are for years beginning July 1. c/ Data not available. d/ Per cent of production. e/ Currant imports were 20 tons or less annually 1943-1947. f/ Consumption 1942-1945 for civilian population only in cols. 6, 8, 10, & 11.

(Continued)

APPENDIX TABLE 51 - Continued

Source: Compiled by S. W. Shear, Giannini Foundation of Agricultural Economics, University of California. April 1950 from official and best unofficial data available. Shipments total, Col. 2 and to U. S. Markets i.e. U. S. Consumption, Col. 5 (Col. 2 minus Col. 3) are rounded to the nearest 5,000 tons and exports Col. 3 to the nearest 100 tons. Shipments are those primarily for human consumption as raisins. However cols. 2, 5, 7, 9, & 10 include any raisins used for making home-made alcoholic beverages roughly estimated at about 9000 dry tons a year during 1927-1932 (in footnote to table 29) and probably about as much in earlier Prohibition years and presumably include the small tonnage used by commercial wineries and distilleries for making brandy during 1935-1948 (see table 79) except the following tonnage diverted to by-products by industry programs is excluded from those columns: 1933, 15,000 tons of Muscats to distilleries; 1935, 5,000 tons to by-products; and 52,000 tons of 1938 crop to stock feed or distilling in 1938 & 1939. Col. 2 equals the sum of cols. 3 plus 5 except for 1942-1945, Col. 2 includes and Cols. 5, 7, 9 & 10 exclude all government shipments for our military personnel at home and abroad and for Red Cross exports. Cols. 5, 7, 9, & 10 for 1942-1945 are not exactly comparable to those for other years for civilian consumption only from a processed table compiled by the Bureau of Agricultural Economics in 1949 on Raisins and Dried Currants: United States Supply and Distribution, pack years 1941-1947. Data of all other years in Col. 5, 7, 9, & 10 include consumption by our military personnel and any government financed tonnage for relief. Over 11,000 tons were distributed through the Blue Stamp Plan in 1940 and 1941 while direct domestic relief, mostly for school lunches and other institutional feeding was in tons; 1937, 15,000; 1938 about 10,000; 1939, 45,000; 1940, 33,000; 1941, 9,000; 1947, 7,500; and 1948, 3900.

Col. 3 Commercial exports only 1921-1940 but 1941-1945 includes lend-lease totalling at least 280,000 tons, also 1945-1948 includes overseas relief shipments of UNRRA and ECA. Commercial exports only were 40,200 tons in 1947 and 19,500 in 1948; the additional tonnage purchased by our government and shipped abroad for foreign relief was about 118,000 tons of the 1947 crop and 59,000 tons of the 1948. The 118,000 tons is shown as shipped during the September 1947 through August 1948 but some of it was actually shipped in the year beginning September 1, 1948.

APPENDIX TABLE 52

CALIFORNIA RAISIN AND CURRANT SHIPMENTS TO UNITED STATES AND FOREIGN COUNTRIES AND PACKERS' F.O.B. PRICES OF THOMPSON SEEDLESS RAISINS, YEARS BEGINNING SEPTEMBER 1, 1921-1948

Years Beginning Sept. 1	Grand Total	To Domestic Markets			Exports, Lend-Lease and Foreign Relief				F.O.B. Price Thompsons Per Pound
		Total and Canada	United States	Canada	Total		United Kingdom	Other Countries	
					Including Canada	Excluding Canada			
	1	2 (3+4)	3	4	5	6 (5-4)	7	8 (6-7)	9
	Equivalent sweat-box weight, short tons of 2000 pounds								Cents
1921	155,000	139,700	125,200	14,500	29,800	15,300	11,000	4,300	14.0
1922	190,000	153,500	135,000	18,500	55,000	36,500	20,400	16,100	10.5
1923	195,000	168,400	149,400	19,000	45,600	26,600	8,300	18,300	7.3
1924	220,000	187,600	167,600	20,000	52,400	32,400	14,800	17,600	7.4
1925	240,000	185,300	168,000	17,300	72,000	54,700	23,700	31,000	7.3
1926	245,000	182,400	162,300	20,100	82,700	62,600	28,500	34,100	6.8
1927	285,000	199,600	178,000	21,600	107,000	85,400	37,700	47,700	5.6
1928	290,000	193,400	171,000	22,400	119,000	96,600	37,500	59,100	4.4
1929	215,000	162,900	148,600	14,300	66,400	52,100	19,100	33,000	4.9
1930	215,000	160,100	148,200	11,900	66,800	54,900	21,700	33,200	4.7
1931	185,000	131,000	124,100	6,900	60,900	54,000	24,100	29,900	5.1
1932	220,000	160,700	155,300	5,400	64,700	59,300	26,500	32,800	3.3
1933	190,000	143,300	137,500	5,800	52,500	46,700	17,800	28,900	4.2
1934	190,000	145,800	141,800	4,000	48,200	44,200	18,800	25,400	4.3
1935	220,000	163,500	159,100	4,400	60,900	56,500	28,500	28,000	4.1
1936	200,000	144,800	140,900	3,900	59,100	55,200	26,000	29,200	4.8
1937	225,000	151,200	148,300	2,900	76,700	73,800	32,000	41,800	4.0
1938	225,000	143,700	140,700	3,000	84,300	81,300	34,100	47,200	3.7
1939	250,000	192,900	187,900	5,000	62,100	57,100	16,200	40,900	3.4
1940	215,000	168,900	165,700	3,200	49,300	46,100	34,600	11,500	4.3
1941	205,000	156,400	152,400	4,000	52,600	48,600	38,600	10,000	6.0
1942	275,000	170,600	162,000	8,600	84,900	76,300	73,100	3,200	7.8
1943	375,000	230,100	215,000	15,100	126,800	111,700	105,300	6,400	7.8
1944	350,000	232,000	215,000	17,000	104,100	87,100	73,800	13,300	7.9
1945	230,000	182,200	170,000	12,200	53,300	41,100	27,800	13,300	7.9
1946	195,000	151,400	151,200	200	43,800	43,600	27,500	16,100	18.0
1947	305,000	169,700	146,800	22,900	158,200	135,300	2,200	133,100	8.5
1948	230,000	159,700	151,500	8,200	78.500	70,300	24,000	46,300	8.5

Source: Compiled by S. W. Shear, Giannini Foundation of Agricultural Economics, University of California, April 1950, from official and best unofficial data available. Total shipments and to the United States are rounded to nearest 5000 tons in Cols. 1 and 3 and exports Cols. 4-8 to the nearest 100 tons. Equivalent sweat-box weight is net processed weight divided by 0.92. Shipments are those primarily for human consumption as raisins. However Cols. 1 and 3 include any raisins used for making home-made alcoholic beverages roughly estimated at about 9000 dry tons a year during 1927-1932 (in footnote to table 29) and probably about as much in earlier Prohibition years and presumably include the small tonnage used by commercial wineries & distilleries for making brandy during 1935-1948 (see table 79) except the following tonnage diverted to by-products by industry programs is excluded from Cols. 1 and 3: 1933, 15,000 tons of Muscats to distilleries; 1935, 5000 tons to by-products; and 52,000 tons of 1938 crop to stock feed or distilling in 1938 & 1939. Col. 1 - Equals the sum of Cols. 3 plus 5 except for 1942-1945, Col. 1 includes and Col. 3 excludes all government shipments for our military personnel at home and abroad and for Red Cross exports. Col. 3 - Shipments for 1942-1945 are not exactly comparable to those for other years as they are for civilian consumption only from a table compiled by the Bureau of Agricultural Economics in 1949 on Raisins and Dried Currants: United States Supply and Distribution, pack years 1941-1947. Data for all other years in Col. 3 include consumption by our military personnel and any government financed tonnage for relief. Over 11,000 tons were distributed through the Blue Stamp Plan in 1940 and 1941 while direct domestic relief, mostly for school lunches and other institutional feeding, was, in tons: 1937, 15,000; 1938 about 10,000; 1939, 45,000; 1940, 33,000; 1941, 9,000; 1947, 7,500; and 1948, 3,900. Col. 4 - Commercial exports only to Canada for all years. Cols. 5-8 - Commercial exports only 1921-1940 but 1941-1945 includes lend-lease totalling at least 280,000 tons, also 1945-1948 includes overseas relief shipments of UNRRA and ECA. Commercial exports only were 40,200 tons in 1947 and 19,500 in 1948; the additional tonnage purchased by our government and shipped abroad for foreign relief was about 118,000 tons of the 1947 crop and 59,000 tons of the 1948. The 118,000 tons is shown as shipped during September 1947 through August 1948 but some of it actually was shipped in the year beginning September 1, 1948. Col. 9 - Prices 1921-1929 are averages of packers' actual sales prices, 1921-1923 for all varieties and 1924-1929 for Thompson Seedless only. Data for 1930-1941 and 1946-1948 are estimates based on weekly quotations in the California Fruit News of packers' f.o.b. prices of choice bulk Thompsons; 1942-1945 are O.P.A. ceiling prices.

APPENDIX TABLE 53

WORLD RAISIN AND CURRANT PRODUCTION BY CHIEF COUNTRIES, 1909-1949

Year Harvested	Raisins and Currants[a]	Currants[a]		Raisins							
		Greece	Australia	Total	California[a]	Turkey (Smyrna)	Australia	South Africa[a]	Greece and Crete	Spain	Iran (Persia)
	1	2	3	4	5	6	7	8	9	10	11
	Short Tons, Natural Dry Weight										
Averages:											
1909-1913	404,900	174,600	4,100	226,200	71,700	54,800	7,100	1,300	15,000	21,300	55,000
1920-1924	493,700	136,300	10,700	346,700	203,800	40,100	18,800	5,700	15,000	19,500	43,800
1925-1929	598,900	159,100	13,700	426,100	246,600	47,800	37,900	5,400	20,200	26.300	41,900
1930-1934	523,700	127,700	19,600	376,400	197,800	51,000	53,900	6,500	21,100	16,700	29,400
1935-1939	618,400	135,700	21,400	461,300	233,400	73,900	60,300	10,300	32,700	14,500	36,200
Annual:											
1925	538,600	167,000	13,100	358,500	200,000	32,500	28,600	5,300	18,500	33,500	40,000
1926	625,100	183,500	13,500	428,100	272,000	39,200	25,100	5,400	16,500	25,900	44,000
1927	648,800	141,500	13,000	494,300	285,000	56,000	49,000	5,400	24,600	25,800	48,500
1928	611,300	160,000	8,000	443,300	261,000	49,300	27,600	5,600	25,600	25,200	49,000
1929	570,800	143,400	21,200	406,200	215,000	62,000	59,100	5,300	16,000	20,900	28,000
1930	524,800	147,400	21,200	356,200	192,000	38,900	59,700	5,000	15,000	17,600	28,000
1931	414,700	73,700	19,600	321,400	169,000	29,700	37,000	6,400	15,000	16,300	48,000
1932	605,900	142,200	19,300	444,400	262,000	71,600	46,200	6,400	22,000	21,200	15,000
1933	536,000	125,100	18,400	392,500	195,000	60,700	68,700	8,600	28,000	11,500	20,000
1934	537,600	150,000	20,000	367,600	171,000	54,000	57,900	6,400	25,500	16,800	36,000
1935	632,400	168,000	23,500	440,900	203,000	87,000	51,400	8,000	35,500	21,000	35,000
1936	552,900	133,000	13,800	406,100	182,000	71,200	56,700	9,200	29,500	17,500	40,000
1937	587,400	131,900	20,400	435,100	247,000	48,000	59,400	10,700	27,000	11,000	32,000
1938	693,800	123,700	23,200	546,900	290,000	82,000	79,500	12,400	34,000	13,000	36,000
1939	626,500	122,000	27,000	477,500	245,000	81,000	54,700	11,100	37,500	10,200	38,000
1940	534,700	134,000	27,800	372,900	171,000	33,000	79,300	12,000	30,700	9,400	38,000
1941	513,400	102,300	19,000	391,900	209,000	40,700	70,400	10,700	21,500	6,600	33,000
1942	536,100	54,300	23,700	458,100	254,000	55,000	79,900	13,700	19,800	8,200	27,500
1943	704,600	44,900	23,800	635,900	401,000	77,000	78,000	13,400	17,600	10,400	38,500
1944	594,300	55,000	28,400	510,900	309,500	49,500	77,600	13,300	17,600	10,400	33,000
1945	494,400	41,800	19,700	432,900	241,000	71,500	56,500	12,600	9,400	8,600	33,300
1946	473,100	62,200	15,700	395,200	193,000	60,500	65,400	13,500	20,900	6,100	35,800
1947	556,900	84,500	12,700	459,700	306,000	33,000	50,500	10,500	26,400	11,300	22,000
1948[b]	559,900	77,000	19,300	463,600	232,000	77,000	70,100	10,500	25,300	6,900	41,800
1949[b]	568,000	94,600	20,100	453,300	263,000	66,000	44,100	9,000	31,900	9,600	29,700

[a] Raisin production given includes additional small tonnage of currants produced in California of about 4,000 tons in recent years, and in Union of South Africa of about 1,000 tons but excludes Argentina and Chile raisin production of 6,000 to 8,000 tons in recent years.

[b] Data for foreign countries for 1948 and 1949 are preliminary as of October 1949, and subject to considerable revision for 1949 for all but Australia and South Africa.

Source: Compiled by S. W. Shear, Giannini Foundation of Agricultural Economics, University of California, March 1950, from California Crop Reports, and excludes dried grapes other than raisin varieties. Foreign production largely from reports of Office of Foreign Agricultural Relations. U. S. Dept. Agr., released currently by it and the Federal-State Market News Service at Sacramento, which also include estimates for minor countries not shown in this table.

APPENDIX TABLE 54

MONTHLY PRICES OF DESSERT AND STILL TABLE WINES, BULK, F.O.B. CALIFORNIA

Year	Jan.	Feb.	Mar.	April	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
	Cents Per Gallon											
	Still Table Wines, Red & White											
1934	82.5	82.5	72.5	72.5	72.5	72.5	52.5			40.0	40.0	40.0
1935	30.0	30.0	30.0	30.0	30.0	26.2	30.0	30.0	30.0	30.0	30.0	27.5
1936	30.8	27.7	28.5	28.5	28.8	27.3	27.2	26.7	27.0	26.8	26.4	27.6
1937	27.6	27.4	27.9	28.0	27.5	27.2	26.6	31.5	27.5	28.6	26.8	26.9
1938	24.9	25.5	24.7	24.3	24.2	25.0	24.5	24.1	24.5	24.3	24.8	19.0
1939	20.5	20.5	20.1	20.4	20.2	21.3	21.5	19.2	19.3	19.3	19.3	19.9
1940	19.9	19.6	20.4	20.0	20.7	20.2	19.7	20.2	20.4	19.9	21.2	20.3
1941	37.1	37.2	37.5	36.5	36.5	37.0	37.8	23.2	22.1	22.4	22.2	23.5
1942	23.7	24.0	24.2	24.8	25.8	26.5	24.8	24.3	26.0	26.3	29.7	29.4
1943												
1944												
1945												
1946	63.8	69.5	67.2	67.3	66.4	75.6	68.4	83.9	64.3	84.2	99.7	95.5
1947	111.0	95.0	96.1	77.7	71.9	53.4	55.1	49.8	49.1	44.1	43.6	44.5
1948	43.2	43.0	46.7	40.2	43.3	43.9	43.4	43.3	43.6	42.5	42.7	44.3
1949	40.0	40.0	40.0	40.0	40.0	40.0	40.0	38.2	40.0	36.0	36.5	37.0
1950	37.5	37.5	38.0									
	Dessert Wines											
1934	122.5	122.5	112.5	112.5	112.5	112.5	82.5	82.5	82.5	82.5	82.5	82.5
1935	62.5	62.5	51.2	62.5	52.5	62.5	51.2	47.5	62.5	51.2	51.2	50.2
1936	53.5	53.2	52.8	53.3	54.8	51.5	49.5	50.2	50.2	50.2	50.2	51.3
1937	50.8	51.2	51.8	53.2	52.2	51.5	48.3	45.5	47.5	46.0	46.5	45.5
1938	44.7	43.7	43.7	48.5	40.7	40.0	39.3	39.7	40.0	39.7	39.3	34.2
1939	34.5	34.9	34.5	32.4	32.5	32.5	31.4	31.6	31.2	31.5	31.4	32.6
1940	32.5	32.1	32.3	32.2	32.1	32.7	31.7	32.1	31.9	29.9	29.9	29.8
1941	29.7	29.7	29.7	26.5	30.2	29.6	29.5	30.4	31.4	32.2	32.8	33.0
1942	35.7	35.8	35.5	36.0	36.8	35.8	35.8	35.9	35.7	37.0	43.6	43.5
1943												
1944												
1945												
1946	91.0	98.2	95.4	100.7	108.6	100.4	108.2	103.2	120.6	131.8	145.9	130.4
1947	125.7	127.1	127.6	96.0	71.8	57.8	54.1	48.7	46.9	46.4	48.1	45.1
1948	49.5	48.6	47.4	48.2	49.5	49.3	48.6	48.7	48.4	49.4	48.2	45.6
1949	44.5	41.2	41.2	41.2	41.2	41.2	40.5	37.5	37.5	37.0	41.0	45.0
1950	47.0	49.5	55.5									

Source: Compiled by the Giannini Foundation, February 1950, from records of from six to eight wineries except data beginning October 1949 are simple averages of weekly prices based upon the Federal-State Market News Bulk Wine Market Information Bulletins.

Table wine prices are average of white and red excluding the lower prices quoted on lighter-colored red. Dessert wines exclude vermouth.

APPENDIX TABLE 55
UNITED STATES APPARENT PER-CAPITA CONSUMPTION OF STILL WINES, AVERAGES, YEARS BEGINNING JULY 1, 1935—1939 AND 1945—1948

Type[a]	Averages		Per Cent Change
	1935-1939	1945-1948	
	Gallons Per Capita		
Commercial and Homemade, Total	.78	.96	+ 23
Commercial Only, Total[b]	.52	.80	+ 54
Dessert, Over 14%	.35	.60	+ 71
Table, Not Over 14%	.17	.20	+ 18
Table, Homemade	.25	.16	- 36
Table, Total[c]	.42	.36	- 14

[a] Data include vermouth but exclude all sparkling wine.

[b] Imports of foreign wine included which averaged 2.5 per cent of United States consumption of commercial wine during 1945-1948 or approximately .02 gallons per capita of which .015 were dessert and .005 were table.

Source: Compiled by S. W. Shear, Giannini Foundation of Agricultural Economics, University of California, Berkeley, November 1949, largely from official reports except homemade wine is estimated from California shipments of "juice" grapes.

APPENDIX TABLE 56

APPARENT CONSUMPTION OF CALIFORNIA WINES IN ALL MARKETS AND STOCKS IN BOND OF ALL STILL WINE IN CALIFORNIA DEC. 31, 1938-1949

Calendar Year	Apparent Consumption In All Markets a/			California Stocks in Bond December 31 b/		
	Still Wine			Still Wine		
	Table	Dessert c/	~~Still &~~ Sparkling	Table	Dessert c/	Total
	1	2	3	4	5	6
	Thousand Gallons			Thousand Gallons		
1938	+16,298	38,591	54,889	44,998	68,238	113,236
1939	18,226	46,235	64,461	41,587	74,295	115,882
1940	19,349	56,146	75,495	45,414	98,663	144,077
1941	21,868	67,073	+88,941	53,187	109,919	163,106
1942	23,363	72,517	95,880	48,874	74,469	123,343
1943	23,688	49,134	72,822	52,072	71,225	123,297
1944	23,399	50,826	74,225	53,431	79,173	132,604
1945	20,538	59,821	80,359	55,691	99,642	155,333
1946	27,441	94,437	+121,878	57,114	128,011	185,125
1947	17,688	68,207	85,895	55,350	128,660	184,010
1948	20,053	87,848	107,901	55,969	147,107	203,076
1949	21,497	95,826	117,323	53,748	118,160	171,908

a/ Apparent consumption is state tax-paid sales within California plus tax-exempt sales and all shipments to points outside of California, including the small quantity exported.

b/ Inventories are stocks of California-produced wine in California bonded wineries, bonded storerooms, and bonded warehouses only, as shown by unaudited reports of the U. S. Treasury Department.

c/ Dessert wine includes vermouth.

d/ Preliminary estimates of December 31, 1949 stocks.

Source: Compiled by S. W. Shear, Giannini Foundation of Agricultural Economics, University of California, March 1950, from Wine Institute, Annual Wine Industry Statistical Surveys, Part 1.

APPENDIX TABLE 57

APPARENT CONSUMPTION OF STILL WINE IN THE UNITED STATES, CALIFORNIA AND OTHER STATES: HOME-MADE WINE PRODUCTION AND TAX-PAID WITHDRAWALS OF COMMERCIAL DOMESTIC AND IMPORTED STILL WINE, YEARS BEGINNING JULY 1, 1933 – 1948

Years beginning July 1	For consumption in United States[a]						In California			In Other States		
	Grand total	Total	Dessert over 14 per cent	Table, not over 14 per cent alcohol								
		Commercial			Homemade	Total	Total	Commercial	Homemade	Total	Commercial	Homemade
	1	2	3	4	5	6	7	8	9	10	11	12
	Thousands of Wine Gallons, 000 Omitted											
Average:												
1935-39	100,414	67,525	45,399	22,126	32,889	55,015	22,874	20,477	2,397	77,540	47,048	30,492
1945-48	137,450	114,826	85,642	29,184	22,624	51,808	19,547	18,797	750	117,904	96,030	21,874
Annual:												
1933	51,948	17,328	10,874	6,454	34,620	41,074	13,010	8,000	5,010	38,938	9,328	29,610
1934	70,903	37,843	24,481	13,362	33,060	46,422	21,650	17,600	4,050	49,253	20,243	29,010
1935	86,198	50,183	33,135	17,048	36,015	53,063	23,957	21,152	2,805	62,241	29,031	33,210
1936	95,667	65,832	43,765	22,067	29,835	51,902	23,942	20,897	3,045	71,725	44,935	26,790
1937	99,067	64,402	42,078	22,324	34,665	56,989	21,523	19,828	1,695	77,544	44,574	32,970
1938	99,951	70,731	47,254	23,477	29,220	52,697	22,340	19,760	2,580	77,611	50,971	26,640
1939	121,189	86,479	60,765	25,714	34,710	60,424	22,608	20,748	1,860	98,581	65,731	32,850
1940	126,405	91,635	64,621	27,014	34,770	61,784	21,288	19,623	1,665	105,117	72,012	33,105
1941	137,925	104,610	74,285	30,325	33,315	63,640	21,785	20,465	1,320	116,140	84,145	31,995
1942	144,035	112,325	74,875	37,450	31,710	69,160	20,906	19,691	1,215	123,129	92,634	30,495
1943	105,580	96,085	58,005	38,080	9,495	47,575	17,658	16,833	825	87,922	79,252	8,670
1944	114,942	95,442	64,195	31,247	19,500	50,747	20,162	19,517	645	94,780	75,925	18,855
1945	136,915	113,665	81,743	31,922	23,250	55,172	20,470	19,690	780	116,445	93,975	22,470
1946	129,003	107,898	79,152	28,746	21,105	49,851	17,780	17,180	600	111,223	90,718	20,505
1947	138,430	113,815	87,876	25,939	24,615	50,554	19,295	18,350	945	119,135	95,465	23,670
1948	145,453	123,928	93,797	30,131	21,525	51,656	20,642	19,967	675	124,811	103,961	20,850
1949[b]		b/	b/	b/	18,615				675			17,940

a/ During 1909-1913 U. S. commercial wine consumption averaged 49,445,000 gallons - dessert 19,198,000 table 30,247,000 - and very little homemade wine was made.

b/ U. S. Tax-paid withdrawals of domestic still wine during July 1, 1949 - January 31, 1950 exceeded the average for the corresponding seven months of the two preceding years by about 17 per cent for all still wine and dessert wine and 21 per cent for table wine. The rates of increase are not likely to be as high for the last five months and for the whole year as these for the first seven months. The rates of increase are not likely to be as high for the last five months (February - June) and for the whole season (July-June) as the rates for the first seven months (July-January).

Source: Compiled by S. W. Shear, Giannini Foundation of Agricultural Economics, University of California, April 1950, largely from official reports. Calculated by addition or subtraction except cols. 3, 4, & 9. Cols. 3, 4: Imports for consumption, tax-paid and tax free, plus tax-paid withdrawals of wine produced in U. S. from U. S. Bureau of Internal Revenue reports. Dessert covers all vermouth, including the small production of rectifying plants and also sake imports.

Col. 5: Estimated homemade from California grapes shipped fresh for "juice" and dried wine and table varieties, converted at 150 gallons per fresh tons; excludes homemade wine from grapes produced in other states.

Col. 9: Estimated at 150 gallons per fresh ton, from wine varieties taken by fresh markets in California Col. 8: Sum of monthly data of state tax-paid sales within California as compiled by the Wine Institute from California Board of Equalization reports (see Wine Institute annual Wine Industry Statistical Surveys Part I & monthly releases on sales.)

APPENDIX TABLE 58

APPARENT PER CAPITA CONSUMPTION OF STILL WINE IN THE UNITED STATES, CALIFORNIA AND OTHER STATES: HOMEMADE WINE PRODUCTION AND TAX-PAID WITHDRAWALS OF COMMERCIAL DOMESTIC AND IMPORTED STILL WINE, YEARS BEGINNING JULY 1, 1933 — 1948

Years Beginning July 1	For Consumption in United States[a]						In California			In Other States		
	Grand Total	Total	Dessert Over 14 Per Cent	Table not over 14 Per Cent Alcohol			Total	Commercial	Homemade	Total	Commercial	Homemade
		Commercial			Homemade	Total						
	1	2	3	4	5	6	7	8	9	10	11	12
	Wine Gallins Per Capita											
Averages:												
1935-39	.77	.52	.35	.17	.25	.42	3.54	3.17	.37	.63	.38	.25
1945-48	.96	.80	.60	.20	.16	.36	1.97	1.90	.07	.88	.72	.16
Annual:												
1933	.41	.14	.09	.05	.27	.32	2.20	1.35	.85	.32	.08	.24
1934	.56	.30	.19	.11	.26	.37	3.63	2.95	.68	.41	.17	.24
1935	.67	.39	.26	.13	.28	.42	3.97	3.51	.46	.51	.24	.27
1936	.74	.51	.34	.17	.23	.40	3.92	3.42	.50	.59	.37	.22
1937	.77	.50	.33	.17	.27	.44	3.22	2.97	.25	.63	.36	.27
1938	.76	.64	.36	.18	.22	.40	3.31	2.95	.38	.63	.41	.22
1939	.92	.66	.46	.20	.26	.46	3.28	3.01	.27	.79	.53	.26
1940	.95	.69	.49	.20	.26	.46	2.97	2.74	.23	.84	.58	.26
1941	1.04	.79	.56	.23	.25	.48	2.86	2.69	.17	.92	.67	.25
1942	1.08	.84	.56	.28	.24	.52	2.57	2.42	.15	.98	.74	.24
1943	.79	.72	.43	.29	.07	.36	2.06	1.97	.09	.70	.63	.07
1944	.88	.73	.49	.24	.15	.39	2.26	2.19	.07	.77	.62	.15
1945	1.00	.83	.60	.23	.17	.40	2.19	2.11	.08	.91	.74	.17
1946	.91	.76	.56	.20	.15	.35	1.83	1.77	.06	.84	.69	.15
1947	.96	.79	.61	.18	.17	.35	1.94	1.85	.09	.88	.71	.17
1948	.99	.84	.64	.20	.15	.35	1.94	1.88	.06	.91	.76	.15
1949		b/	b/	b/	.12				.06			

a/ During 1909-1913 U. S. commercial wine consumption per capita averaged 0.52 gallons -- dessert 0.2, table 0.32 -- and very little homemade wine was made.

b/ United States tax-paid withdrawals of domestic still wine during July 1, 1949 - February 28, 1950 exceeded the average for the corresponding eight months of the two preceding years by about 17 per cent for all still wine; 16 for dessert wine and 22 per cent for table wine.

Source: Computed by S. W. Shear, Giannini Foundation of Agricultural Economics, University of California, March 1950, largely from official reports. Calculated from data in preceding table by dividing by December 31 population of continental U. S. (excluding armed forces overseas) as reported by the U. S. Bureau of the Census.

APPENDIX TABLE 59

COMMERCIAL STILL WINE: NET FINISHED PRODUCTION, TABLE AND DESSERT UNITED STATES AND CALIFORNIA, 1933-1949

Year beginning July 1	Total[a]		Dessert[a]		Table[a]	
	United States	California	United States	California	United States	California
	Thousands of wine gallons, 000 omitted					
	1	2	3	4	5	6
1933	39,239	35,679	17,583	16,052	21,656	19,627
1934	41,980	37,005	27,311	25,928	14,669	11,077
1935	69,821	65,690	55,363	54,013	14,458	11,677
1936	51,978	46,679	36,481	34,700	15,497	11,979
1937	95,237	85,351	59,415	57,302	35,872	28,049
1938	60,393	50,342	38,318	35,581	22,075	14,761
1939	80,782	71,478	58,571	55,304	22,211	16,174
1940	113,998	100,818	82,865	79,008	31,133	21,810
1941	118,182	105,198	82,139	77,820	36,043	27,378
1942	66,926	53,930	39,098	35,851	27,828	18,079
1943	88,412	74,008	47,171	46,715	41,241	27,293
1944	99,315	84,616	62,368	60,511	36,947	24,105
1945	110,414	103,543	81,758	81,169	26,656	22,374
1946	181,703	161,518	124,127	121,377	37,576	30,141
1947	100,685	94,522	77,987	77,006	22,698	17,516
1948	136,383	129,930	108,410	107,318	27,973	22,612
1949[b]	98,000	91,000	76,000	75,000	22,000	16,000

[a] Data exclude vermouth and all sparkling wines.

[b] Rough forecast of 1949 production.

Source: Compiled by S. W. Shear, Giannini Foundation of Agricultural Economics, University of California, Berkeley, April 1950, from calculations based on the latest data of U. S. Bureau of Internal Revenue as reported in December Annual Wine Industry Statistical Surveys of the Wine Institute. Calculated as follows: United States 1933-1942 equals year-end stocks in bond plus withdrawals tax-paid for domestic use and tax-free for export and family use, minus stocks beginning of year; California 1933-1948 equals gross production minus diversion to other uses and excess of allowed losses over not allowed.

APPENDIX TABLE 60

UNITED STATES PRODUCTION, STOCKS, SUPPLY, AND DISAPPEARANCE OF DOMESTIC COMMERCIAL STILL WINE

AVERAGE 1909 – 1913, ANNUAL 1933 – 1949

Years Beginning July 1	Stocks, July 1a/			Net Finished Productiona/			Total Supplya/			Disappearancea/		
	Total	Dessert, Over 14% Alcohol	Table, Not Over 14%	Total	Dessert, Over 14% Alcohol	Table, Not Over 14%	Total	Dessert, Over 14% Alcohol	Table, Not Over 14%	Total	Dessert, Over 14% Alcohol	Table, Not Over 14%
	1	2	3	4	5	6	7	8	9	10	11	12
	Thousands of Wine Gallons, that is, 000 Omitted											
Average:												
1909-13	--	--	--	52,924	20,074	32,850	--	--	--	49,445	19,198	30,247
1935-39	80,002	46,020	33,982	71,652	49,630	22,022	151,654	95,650	56,004	64,313	43,111	21,202
1945-48	128,164	81,232	46,932	127,295	98,070	29,226	255,460	179,302	76,158	112,328	84,323	28,005
Annual:												
1933	25,542	11,597	13,945	39,239	17,583	21,656	64,781	29,180	35,601	14,613	9,516	5,097
1934	50,168	19,664	30,504	41,980	27,311	14,669	92,148	46,975	45,173	35,671	23,396	12,275
1935	56,477	23,579	32,898	69,821	55,363	14,458	126,298	78,942	47,356	47,826	31,855	15,971
1936	78,545	47,096	31,449	51,978	36,481	15,497	130,523	83,577	46,946	62,395	41,208	21,187
1937	68,128	42,369	25,759	95,287	59,415	35,872	163,415	101,784	61,631	61,399	39,920	21,479
1938	102,016	61,864	40,152	60,393	38,318	22,075	162,409	100,182	62,227	67,567	44,990	22,577
1939	94,842	55,192	39,650	80,782	58,571	22,211	175,624	113,763	61,861	82,379	57,583	24,796
1940	93,245	56,180	37,065	113,998	82,865	31,133	207,243	139,045	68,198	89,356	62,331	27,025
1941	117,887	76,714	41,173	118,182	82,139	36,043	236,069	158,853	77,216	102,874	72,293	30,581
1942	133,195	86,560	46,635	66,926	39,098	27,828	200,121	125,658	74,463	109,090	71,512	37,578
1943	91,031	54,146	36,885	88,412	47,171	41,241	179,443	95,387	78,126	85,130	41,717	37,483
1944	94,313	53,670	40,643	99,315	62,368	36,947	193,628	116,038	77,590	90,904	59,281	31,623
1945	102,724	56,757	45,967	110,414	81,758	28,656	213,128	138,515	74,623	111,114	76,939	34,185
1946	102,014	61,576	40,438	161,703	124,127	37,576	263,717	185,703	78,014	103,506	76,949	26,557
1947	160,211	108,754	51,457	100,685	77,987	22,698	260,896	186,741	74,155	113,188	88,898	24,290
1948	147,708	97,843	49,865	136,383	108,410	27,973	284,091	206,253	77,838	121,505	94,505	27,000
1949b/	162,586	111,748	50,838	98,000	76,000	22,000	260,000	188,000	72,000			

a/ Data exclude vermouth and all sparkling wines except the very small production of these, 1909-1913.

b/ Rough forecast of 1949 production and supply.

Source: Compiled by S. W. Shear, Giannini Foundation of Agricultural Economics, University of California, Berkeley, April 1950.

Cols. 1-3: From latest reports of the U. S. Bureau of Internal Revenue.

Cols. 4-6: Calculated from latest reports of U. S. Bureau of Internal Revenue; 1933-1942 year-end stocks in bond (cols. 1-3) plus withdrawals tax-paid for domestic use and tax-free for export and family use minus stocks beginning of year (cols. 1-3); 1943-1948 estimates of the Wine Institute, 12th and 13th Annual Wine Industry Statistical Survey Part III, p. 7.

Cols. 7-9: Calculated; July 1 stocks (cols. 1-3) plus production (cols. 4-6).

Cols. 10-12: Calculated; supply (cols. 7-9) minus year-end stocks (cols. 1-3).

APPENDIX TABLE 61

CALIFORNIA PRODUCTION, STOCKS, SUPPLY AND DISAPPEARANCE OF DOMESTIC COMMERCIAL STILL WINE, AVERAGE 1909-1913, ANNUAL 1933-1949

Years beginning July 1	Stocks, July 1a/			Net finished productiona/			Total Supplya/			Disappearancea/		
	Total	Dessert, over 14% alcohol	Table, not over 14%	Total	Dessert, over 14% alcohol	Table, not over 14%	Total	Dessert, over 14% alcohol	Table, not over 14%	Total	Dessert, over 14% alcohol	Table, not over 14%
	1	2	3	4	5	6	7	8	9	10	11	12
	Thousands of wine gallons, that is, 000 omitted											
Average:												
1909-13	--	--	--	43,595	19,161	124,434	--	--	--	--	--	--
1935-39	67,886	40,678	27,208	63,908	47,380	16,528	131,794	88,058	43,736	57,939	41,696	16,243
1945-48	109,592	72,619	36,973	119,646	96,388	23,258	229,238	169,007	60,231	105,176	83,458	21,718
Annual:												
1933	22,620	10,351	12,269	35,679	16,052	19,627	58,299	26,403	31,896	12,974	8,640	4,334
1934	43,447	17,239	26,208	37,005	25,928	11,077	80,452	43,167	37,285	33,066	22,842	10,224
1935	47,386	20,325	27,061	65,690	54,013	11,677	113,076	74,338	38,738	45,206	31,696	13,510
1936	67,870	42,642	25,228	46,679	34,700	11,979	114,549	77,342	37,207	58,212	40,574	17,538
1937	56,337	36,768	19,569	85,351	57,302	28,049	141,688	94,070	47,618	54,363	38,718	15,645
1938	87,325	55,352	31,973	50,342	35,581	14,761	137,667	90,933	46,734	57,155	42,528	14,527
1939	80,512	48,305	32,207	71,478	55,304	16,174	151,990	103,609	48,381	74,759	54,862	19,897
1940	77,231	48,747	28,484	100,818	79,008	21,810	178,049	127,755	50,294	78,511	60,355	18,156
1941	99,538	67,400	32,138	105,198	77,820	27,378	204,736	145,220	59,516	91,719	69,779	21,940
1942	113,017	75,441	37,576	53,930	35,851	18,079	166,947	111,292	55,655	91,112	64,530	26,582
1943	75,835	46,762	29,073	74,008	46,715	27,293	149,843	93,477	56,356	69,877	46,082	23,795
1944	79,966	47,395	32,571	84,616	60,511	24,105	164,582	107,906	56,676	80,202	58,731	21,471
1945	84,380	49,175	35,205	103,543	81,169	22,374	187,923	130,344	57,579	101,692	76,115	25,577
1946	86,231	54,229	32,002	151,518	121,377	30,141	237,749	175,606	62,143	97,322	76,157	21,165
1947	140,427	99,449	40,978	94,522	77,006	17,516	234,949	176,455	58,494	107,642	88,833	18,809
1948	127,328	87,622	39,705	129,930	107,318	22,612	257,258	194,940	62,318	114,047	92,726	21,321
1949b/	143,211	102,214	40,997	91,000	75,000	16,000	234,211	177,214	56,997			

a/ Data exclude vermouth and all sparkling wines except the very small production of these, 1909-1913.

b/ Rough forecast of 1949 net production and supply based on gross production 6 months only July 1 - December 31, 1949.

Source: Compiled by S. W. Shear, Giannini Foundation of Agricultural Economics, University of California, Berkeley, April 1950.

Cols. 1-3: From latest reports of the U. S. Bureau of Internal Revenue.

Cols. 4-6: Calculated from latest data of Bureau of Internal Revenue, see Wine Institute 12th & 13th Annual Wine Industry Statistical surveys. Part III, P. 7 for data 1940-1948. Net equals gross production minus diversion to other uses and excess of allowed losses over not allowed.

Cols. 7-9: Calculated; July 1 stocks (cols. 1-3) plus production (cols. 4-6).

Cols. 10-12: Calculated; supply (cols. 7-9) minus year end stocks (cols. 1-3).

APPENDIX TABLE 62

CALIFORNIA CRUSH, GROSS WINE PRODUCTION, STORAGE CAPACITY AND NUMBER OF BONDED WINERIES AND FRUIT DISTILLERIES BY DISTRICTS, 1940, AND 1945-1949

District and Crush Year a/ (July 1-Dec. 31)	Crushed for wine & brandy b/	Gross Wine Production c/				Storage cooperage Dec. 31 d/	Active bonded e/	
		Total	Dessert	Table			Wineries	Fruit distilleries
				Red	White			
	1	2	3	4	5	6	7	8
	Tons	Thousand Gallons					Number	
State, total								
1949	887,760	100,349	72,516	20,067	7,766	309,337	374	111
1948	1,386,283	141,271	111,019	23,221	7,061	308,455	378	115
1947	965,956	104,458	78,417	19,348	6,693	309,966	384	117
1946	1,651,926	178,089	130,697	28,285	19,107	285,500	390	115
1945	1,169,849	116,675	84,992	19,837	11,846	240,599	401	115
1940	995,981	105,690	78,320	20,362	7,008	196,235	459	101
North of Bay								
1949	80,680	13,841	725	10,824	2,292	47,908	114	11
1948	116,121	18,927	1,966	14,241	2,720	48,063	117	12
1947	86,522	14,940	1,482	11,131	2,327	48,778	118	12
1946	131,815	21,548	2,178	14,587	4,783	47,896	124	11
1945	111,074	17,989	2,196	12,786	3,007	45,863	127	12
1940	106,532	17,431	1,860	13,039	2,532	41,970	138	11
South of Bay								
1949	20,213	2,976	719	1,625	632	16,178	86	5
1948	32,520	4,375	1,695	1,991	689	16,430	84	6
1947	27,824	4,182	1,453	1,755	974	17,027	87	6
1946	45,691	6,370	2,094	2,149	2,127	16,821	88	6
1945	33,816	4,980	1,526	2,155	1,299	16,114	91	7
1940	32,454	4,573	1,564	2,008	1,001	14,586	112	7
Southern Cal.								
1949	88,293	9,199	6,037	2,992	170	25,087	66	23
1948	75,571	8,154	5,199	2,295	660	24,579	64	23
1947	56,634	6,427	3,786	2,165	476	24,924	64	23
1946	123,328	11,573	8,398	2,357	818	25,415	70	29
1945	105,589	9,515	7,154	1,662	699	25,322	72	29
1940	76,841	8,740	6,603	1,433	704	20,035	89	26
Central Valley								
1949	243,810	25,257	22,383	1,852	1,022	81,412	52	32
1948	415,700	37,765	34,924	2,255	586	79,861	63	32
1947	317,526	31,531	29,161	1,354	1,016	80,019	66	34
1946	431,157	44,723	35,867	4,523	4,333	71,543	64	32
1945	361,283	31,004	26,724	1,842	2,438	59,702	67	32
1940	290,938	30,142	25,257	3,130	1,755	49,577	72	26
San Joaquin Val.								
1949	454,764	49,076	42,652	2,774	3,650	138,809	47	40
1948	746,371	72,050	67,205	2,439	2,406	139,522	50	42
1947	477,450	47,378	42,535	2,943	1,900	139,218	49	42
1946	919,935	93,875	82,160	4,669	7,046	123,825	44	37
1945	558,087	53,187	47,392	1,392	4,403	93,598	44	35
1940	489,216	44,804	43,036	752	1,016	70,067	43	32

a/ Counties included in districts: North of Bay: Mendocino, Napa, Sonoma, Humboldt, Solano. South of Bay: Alameda, Contra Costa, San Francisco, Santa Clara, Monterey, San Benito, San Mateo, Santa Cruz & San Luis Obispo. Southern California: Los Angeles, San Bernardino, San Diego, Riverside, Ventura. San Joaquin Valley: Fresno, Kern, Madera, Tulare, Merced, Kings. Central Valley: Sacramento, San Joaquin, Stanislaus, Amador. Central Valley includes the small crush in Sacramento Valley of 246 in 1949, 241 in 1948, 283 in 1947, and 2743 in 1940. For list of counties in districts see footnotes to table 65.

(Continued)

APPENDIX TABLE 62 - Continued

b/ Fresh grapes only crushed for both wine and brandy, July 1 - December 31 excluding dried raisins and all other fruits and fruit products.

c/ Commercial gross still wine production are preliminary data for 6 months only Juby 1 - December 31 making no allowance for losses for diversion for distilling and other by-product uses, for increases resulting from amelioration and fortification etc. Gross production of red table for all years is unadjusted, as reported in Wine Institute bulletins, and white table wine and dessert is adjusted for 1945-1949 by removing sherry and other dessert wine stock from white table wine production as reported by Institute and adding it to dessert wine production, as reported by Institute after raising it to approximate the equivalent gallonage after fortification by dividing it - the dessert stock by 0.85.

d/ Storage capacity, including fermentors, usable for storage.

e/ Number of active bonded wineries in February, March or April of the year following except for August 1940.

Source: Compiled by S. W. Shear, Giannini Foundation of Agricultural Economics, March 1950 from Wine Institute Annual Wine Industry Statistical Surveys, Part I.

APPENDIX TABLE 63

CALIFORNIA ADJUSTED GROSS COMMERCIAL STILL WINE PRODUCTION, DESSERT AND RED AND WHITE TABLE BY DISTRICTS, DURING JULY 1-DECEMBER 31, AVERAGE 1945 - 1948

Wine Class	State Total		Interior Valley[a]		Other Districts					
					Total		Central Coast[b]		Southern California[c]	
	1	2	3	4	5	6	7	8	9	10
	1000's of Gallons	% of State Totals	1000's of Gallons	% of State Totals	1000's of Gallons	% of State Totals	1000's of Gallons	% of State Totals	1000's of Gallons	% of State Totals
Total	135,123	100.0	102,878	76.1	32,245	23.9	23,327	17.3	8,918	6.6
Dessert[d]	101,274	100.0	91,492	90.3	9,782	9.7	3,647	3.6	6,135	6.1
Table[d]	33,849	100.0	11,386	33.6	22,463	66.4	19,680	58.2	2,783	8.2
Red	22,673	100.0	5,354	23.6	17,318	76.4	15,199	67.0	2,120	9.4
White	11,176	100.0	6,032	54.0	5,145	46.0	4,481	40.1	663	5.9

[a] Interior valley includes the 26 interior valley and foothill counties -- Siskiyou on the north through Kern and Inyo on the south or the subdistricts of Sacramento Valley, central or intermediate valley and San Joaquin Valley.

[b] Central coast includes 16 counties north and south of San Francisco Bay -- Humboldt on the north through San Luis Obispo on the south.

[c] Southern California includes the 8 counties south of Tehachapi Mountains.

[d] Gross production is preliminary for 6 months only July 1-December 31, making no allowance for losses for diversion for distilling and other by-product uses, for increases resulting from amelioration and fortification etc. Gross production of red table for all years is unadjusted, as reported in Wine Institute bulletins, and white table wine and dessert is unadjusted for 1937-1944 but adjusted for 1945-1949 by removing sherry and other dessert wine stock from white table wine production as published, and adding it to dessert wine production, as published, after raising it to approximate equivalent gallonage after fortification by dividing it -- the desert stock -- by 0.85.

Source: Compiled by S. W. Shear, Giannini Foundation of Agricultural Economics, University of California, Berkeley, March 1950, from Wine Institute Annual Wine Industry Statistical Surveys, Parts I, Wine Institute Bulletins 374, 304, 272, 413 and 415.

APPENDIX TABLE 64

CALIFORNIA STATE TOTAL GROSS COMMERCIAL STILL WINE PRODUCTION DESSERT AND RED AND WHITE TABLE DURING JULY-DECEMBER, 1935-1949

Year (July 1-December 31)	State Total						
	Dessert[a]		Table Red[a]		Table White[a]		Total
	1000 Gallons	Per Cent of Total[b]	1000 Gallons	Per Cent of Total[b]	1000 Gallons	Per Cent of Total[b]	1000 Gallons
Averages:							
1937-1941	60,495	68.7	19,086	22.5	7,888	8.8	
1945-1948	101,274	74.9	22,673	16.8	11,176	8.3	135,123
Annual:							
1935	53,800	73.7	- [c]	- [c]	- [c]	- [c]	73,000
1936	37,091	69.8	-	-	-	-	53,160
1937	57,780	63.2	23,504	25.7	10,139	11.1	91,423
1938	35,765	63.3	16,338	28.9	4,423	7.8	56,526
1939	53,429	72.5	15,195	20.6	5,076	6.9	73,698
1940	78,320	74.1	20,362	19.3	7,008	6.6	105,690
1941	77,181	70.2	20,032	18.2	12,793	11.6	110,006
1942	36,582	58.9	18,018	29.0	7,547	12.1	62,147
1943	45,484	56.6	26,784	33.3	8,159	10.1	80,427
1944	59,696	65.6	21,972	24.2	9,314	10.2	90,982
1945	84,992	72.8	19,837	17.0	11,846	10.2	116,675
1946	130,697	73.4	28,285	15.9	19,107	10.7	178,089
1947	78,417	75.1	19,348	18.5	6,693	6.4	104,458
1948	110,989	78.6	23,221	16.4	7,061	5.0	141,271
1949	72,516	82.3	20,067	20.0	7,766	7.7	100,349

a/ Gross production is preliminary for 6 months only, July 1-December 31, making no allowance for losses for diversion for distilling and other by-product uses, for increases resulting from amelioration and fortification etc. Gross production of red table for all years is unadjusted, as reported in Wine Institute bulletins, and white table wine and dessert is unadjusted for 1937-1944 but adjusted for 1945-1949 by removing sherry and other dessert wine stock from white table wine production as published and adding it to dessert wine production as published, after raising it to approximate equivalent gallonage after fortification by dividing it - the dessert stock - by 0.85.

b/ Per cent of state total gross wine production.

c/ Dashes indicate no segregation of white and red dry wine production reported for 1935 and 1936 vintage.

Source: Compiled by S. W. Shear, Giannini Foundation of Agricultural Economics, University of California, March 1950, from Wine Institute Annual Wine Industry Statistical Surveys, Parts I, Wine Institute Bulletins 374, 304, 272, 413 and 459.

APPENDIX TABLE 65
CALIFORNIA GROSS STILL WINE PRODUCTION BY DISTRICTS
DESSERT AND RED AND WHITE TABLE JULY — DECEMBER, 1937— 1949

Year (July 1- Dec. 31)	North of Bay[a]						
	Dessert[b]		Table Red[b]		Table White[b]		Total
	1,000 Gallons	Per cent of State Dessert	1,000 Gallons	Per cent of State Table Red	1,000 Gallons	Per cent of State Table White	1,000 Gallons
	1	2	3	4	5	6	7
Averages:							
1937-1941	1,716	2.8	11,323	59.3	2,406	30.5	15,445
1945-1947	1,952	2.0	12,835	57.1	3,372	26.9	18,159
1945-1948	1,956	1.9	13,186	58.2	3,209	28.7	18,351
Annual:							
1937	1,498	2.6	12,479	53.1	2,952	29.1	16,929
1938	1,608	4.5	9,858	60.3	1,919	43.4	13,385
1939	1,626	3.0	9,154	60.2	1,546	30.4	12,326
1940	1,860	2.4	13,039	64.1	2,532	36.1	17,431
1941	1,989	2.6	12,083	60.3	3,080	24.1	17,152
1942	1,231	3.4	11,072	61.4	2,362	31.3	14,665
1943	1,049	2.3	14,966	55.9	2,865	35.1	18,880
1944	1,095	1.8	11,972	54.5	2,860	30.7	15,927
1945	2,196	2.6	12,786	64.5	3,007	25.4	17,989
1946	2,178	1.7	14,587	51.6	4,783	25.0	21,548
1947	1,482	1.9	11,131	57.5	2,327	34.8	14,940
1948	1,966	1.8	14,241	61.3	2,720	38.5	18,927
1949	725	1.0	10,824	53.9	2,292	29.5	13,841
	Central Coast, Total[a]						
Averages:							
1937-1941	2,827	4.7	13,680	71.7	3,436	43.6	19,987
1945-1948	3,648	3.6	15,199	67.0	4,481	40.1	23,328
Annual:							
1937	2,541	4.4	15,447	65.7	3,999	39.4	21,987
1938	2,597	7.3	12,071	73.9	2,664	60.2	17.332
1939	2,427	4.5	11,077	72.9	2,189	43.1	15,693
1940	3,424	4.4	15,122	74.3	3,533	50.4	22,079
1941	3,369	4.4	14,683	73.3	4,794	37.5	22,846
1942	2,167	5.9	12,872	71.4	3,614	47.9	18,653
1943	1,997	4.4	17,373	64.9	4,187	51.3	23,557
1944	2,201	3.7	14,020	63.8	4,054	43.5	20,275
1945	3,722	4.4	14,941	75.3	4,306	36.3	22,969
1946	4,272	3.3	16,736	59.2	6,910	36.2	27,918
1947	2,935	3.7	12,886	66.6	3,301	49.3	19,122
1948	3,661	3.3	16,232	69.9	3,409	48.3	23,302
1949	1,444	2.0	12,449	62.0	3,924	37.6	16,817

(Continued)

APPENDIX TABLE 65 (Cont'd)
CALIFORNIA GROSS STILL WINE PRODUCTION BY DISTRICTS
DESSERT AND RED AND WHITE TABLE JULY — DECEMBER, 1937—1949

Year (July 1 - Dec. 31)	Dessert b/		Table Red b/		Table White b/		Total
	1,000 Gallons	Per cent of State Dessert	1,000 Gallons	Per cent of State Table Red	1,000 Gallons	Per cent of State Table White	1,000 Gallons
	1	2	3	4	5	6	7
	South of Bay a/						
Averages:							
1937-1941	1,155	1.9	2,357	12.4	1,030	13.1	4,543
1945-1948	1,692	1.7	2,013	8.9	1,272	11.4	4,977
Annual:							
1937	1,043	1.8	2,968	12.6	1,047	10.3	5,086
1938	989	2.8	2,213	13.6	745	16.8	3,947
1939	801	1.5	1,923	12.7	643	12.7	3,367
1940	1,564	2.0	2,083	10.2	1,001	14.3	4,648
1941	1,380	1.8	2,600	13.0	1,714	13.4	5,694
1942	936	2.5	1,800	10.0	1,252	16.6	3,988
1943	948	2.1	2,407	9.0	1,322	16.2	4,677
1944	1,106	1.9	2,048	9.3	1,194	12.8	4,348
1945	1,526	1.8	2,155	10.9	1,299	11.0	4,980
1946	2,094	1.6	2,149	7.6	2,127	11.1	6,370
1947	1,453	1.9	1,755	9.1	974	14.6	4,182
1948	1,695	1.5	1,991	8.6	689	9.8	4,375
1949	719	1.0	1,625	8.1	632	8.1	2,976
	Southern California a/						
Averages:							
1937-1941	5,491	9.1	1,352	7.1	930	11.8	7,774
1945-1948	6,134	6.1	2,120	9.4	663	5.9	8,917
Annual:							
1937	5,776	10.0	1,418	6.0	1,171	11.6	8,365
1938	4,420	12.3	1,057	6.5	534	12.1	6,011
1939	5,058	9.5	1,265	8.3	1,088	21.4	7,411
1940	6,603	8.4	1,433	7.0	704	10.1	8,740
1941	5,599	7.2	1,585	7.9	1,157	9.0	8,341
1942	4,501	12.3	1,353	7.5	364	4.8	6,218
1943	5,319	11.7	2,280	8.5	451	5.5	8,050
1944	6,111	10.2	3,078	14.0	671	7.2	9,860
1945	7,154	8.4	1,662	8.4	699	5.9	9,515
1946	8,398	6.4	2,357	8.3	818	4.3	11,573
1947	3,786	4.8	2,165	11.2	476	7.1	6,427
1948	5,199	4.7	2,295	9.9	660	9.3	8,154
1949	6,037	8.3	2,992	14.9	170	2.2	9,199

(Continued)

APPENDIX TABLE 65 (Cont'd)

CALIFORNIA GROSS STILL WINE PRODUCTION BY DISTRICTS

DESSERT AND RED AND WHITE TABLE JULY — DECEMBER, 1937—1949

Year (July 1 - Dec. 31)	Interior Valley[a]						
	Dessert[b]		Table Red[b]		Table White[b]		Total
	1,000 Gallons	Per cent of State Dessert	1,000 Gallons	Per cent of State Table Red	1,000 Gallons	Per cent of State Table White	1,000 Gallons
	1	2	3	4	5	6	7
Averages:							
1937-1941	52,132	86.2	4,055	21.2	3,521	44.6	59,708
1945-1948	91,492	90.3	5,354	23.6	6,032	54.0	102,878
Annual:							
1937	49,463	85.6	6,639	28.3	4,969	49.0	61,071
1938	28,748	80.4	3,210	19.6	1,225	27.7	33,183
1939	45,942	86.0	2,853	18.8	1,799	35.5	50,594
1940	68,293	87.2	3,807	18.7	2,771	39.5	74,871
1941	68,213	88.4	3,764	18.8	6,842	53.5	78,819
1942	29,914	81.8	3,793	21.1	3,569	47.3	37,276
1943	38,168	83.9	7,131	26.6	3,521	43.2	48,820
1944	51,384	86.1	4,874	22.2	4,589	49.3	60,847
1945	74,116	87.2	3,234	16.3	6,841	57.7	84,191
1946	118,027	90.3	9,192	32.5	11,379	59.6	138,598
1947	71,696	91.4	4,297	22.2	2,916	43.6	78,909
1948	102,129	92.0	4,694	20.2	2,992	42.4	109,815
1949	65,035	89.7	4,626	23.1	4,672	60.2	74,333

(Continued)

APPENDIX TABLE 65 (Cont'd)

CALIFORNIA GROSS STILL WINE PRODUCTION BY DISTRICTS

DESSERT AND RED AND WHITE TABLE JULY — DECEMBER, 1937—1949

Year (July 1 - Dec. 31)	Central Coast plus Southern California						
	Dessert[b]		Table Red[b]		Table White[b]		Total
	1,000 Gallons	Per cent of State Dessert	1,000 Gallons	Per cent of State Table Red	1,000 Gallons	Per cent of State Table White	1,000 Gallons
	1	2	3	4	5	6	7
Averages:							
1937-1941	8,363	13.8	15,032	78.8	4,367	55.4	27,761
1945-1948	9,782	9.7	17,318	76.4	5,145	46.0	32,245
Annual:							
1937	8,317	14.4	16,865	71.7	5,170	51.0	30,352
1938	7,017	19.6	13,128	80.4	3,198	72.3	23,343
1939	7,485	14.0	12,342	81.2	3,277	64.5	23,104
1940	10,027	12.8	16,555	81.3	4,237	60.5	30,819
1941	8,968	11.6	16,268	81.2	5,951	46.5	31,187
1942	6,668	18.2	14,225	78.9	3,978	52.7	24,871
1943	7,316	16.1	19,653	73.4	4,638	56.8	31,607
1944	8,312	13.9	17,098	77.8	4,725	50.7	30,135
1945	10,876	12.8	16,603	83.7	5,005	42.3	32,484
1946	12,670	9.7	19,093	67.6	7,728	40.4	39,491
1947	6,721	8.6	15,051	77.8	3,777	56.4	25,549
1948	8,860	8.0	18,527	79.8	4,069	57.6	31,456
1949	7,481	10.3	15,441	76.9	3,094	39.8	26,016

a/ Counties included in districts, Central Coast: North of Bay: Mendocino, Napa, Sonoma, Humboldt, Solano. South of Bay: Alameda, Contra Costa, San Francisco, Santa Clara, Monterey, San Benito, San Mateo, Santa Cruz, and San Luis Obispo. Southern California: Los Angeles, San Bernardino, San Diego, Riverside, and Ventura. Interior Valley: San Joaquin Valley: Fresno, Kern, Madera, Tulare, Merced and Kings. Central Valley: Sacramento, San Joaquin, Stanislaus and Amador.

b/ Gross production is preliminary for 6 months only July 1-December 31, making no allowance for losses for diversion for distilling and other by-product uses, for increases resulting from amelioration and fortification etc. Gross production of red table for all years is unadjusted, as reported in Wine Institute bulletins, and white table wine and dessert is unadjusted for 1937-1944 but adjusted for 1945-1949 by removing sherry and other dessert wine stock from white table wine production as published, and adding it to dessert wine production as published after raising it to approximate equivalent gallonage after fortification by dividing it--the dessert stock--by 0.85.

Source: Compiled by S. W. Shear, Giannini Foundation of Agricultural Economics, University of California, March 1950, from Wine Institute Annual Wine Industry Statistical Surveys, Parts I, Wine Institute Bulletins 374, 304, 272, 413, and 459.

APPENDIX TABLE 66

CALIFORNIA ADJUSTED GROSS COMMERCIAL STILL WINE PRODUCTION, DESSERT AND RED AND WHITE TABLE BY DISTRICTS, JULY 1-DECEMBER 31 1944-1949

District[a]	Total[b]	Dessert[b]	Table		
			Total	Red	White[b]
	1	2	3	4	5
	Thousand Gallons				
	Average 1945-1948				
Average, 1945-1948					
State total	135,123	101,274	33,850	22,673	11,177
Interior Valley	102,878	91,492	11,386	5,354	6,032
Southern California	8,917	6,134	2,783	2,120	663
Coast Counties	23,328	3,648	19,681	15,199	4,482
North of Bay	18,351	1,956	16,396	13,186	3,210
South of Bay	4,977	1,692	3,285	2,013	1,272
Interior Valley	102,878	91,492	11,386	5,354	6,032
Central Valley	31,269	31,669	4,586	2,493	2,093
San Joaquin Valley	66,622	59,823	6,800	2,861	3,939
1949	1949				
State total	100,349	72,516	27,833	20,067	7,766
Interior Valley	74,333	65,035	9,298	4,626	4,672
Southern California	9,199	6,037	3,162	2,992	170
Coast Counties	16,817	1,444	15,373	12,449	2,924
North of Bay	13,841	725	13,116	10,824	2,292
South of Bay	2,976	719	2,257	1,625	632
Interior Valley	74,333	65,035	9,298	4,626	4,672
Central Valley	25,257	22,383	2,874	1,852	1,022
San Joaquin Valley	49,076	42,652	6,424	2,774	3,650
1948	1948				
State total	141,271	110,989	30,282	23,221	7,061
Interior Valley	109,815	102,129	7,686	4,694	2,992
Southern California	8,154	5,199	2,955	2,295	660
Coast Counties	23,302	3,661	19,641	16,232	3,409
North of Bay	18,927	1,996	16,961	14,241	2,720
South of Bay	4,375	1,695	2,680	1,991	689
Interior Valley	109,815	102,129	7,686	4,694	2,992
Central Valley	37,765	34,924	2,841	2,255	586
San Joaquin Valley	72,050	67,205	4,845	2,439	2,406
1947	1947				
State total	104,458	78,417	26,041	19,348	6,693
Interior Valley	78,909	71,696	7,213	4,297	2,916
Southern California	6,427	3,786	2,641	2,165	476
Coast Counties	19,123	2,936	16,187	12,886	3,301
North of Bay	14,941	1,483	13,458	11,131	2,327
South of Bay	4,182	1,453	2,729	1,755	974
Interior Valley	78,909	71,696	7,213	4,297	2,916
Central Valley	31,531	29,161	2,370	1,354	1,016
San Joaquin Valley	47,378	42,535	4,843	2,943	1,900
1946	1946				
State total	178,089	130,697	47,392	28,285	19,107
Interior Valley	138,598	118,027	20,571	9,192	11,379
Southern California	11,573	8,398	3,175	2,357	818
Coast Counties	27,918	4,272	23,646	16,736	6,910
North of Bay	21,548	2,178	19,370	14,587	4,783
South of Bay	6,370	2,094	4,276	2,149	2,127
Interior Valley	138,598	118,027	20,571	9,192	11,379
Central Valley	44,723	35,867	8,856	4,523	4,333
San Joaquin Valley	93,875	82,160	11,715	4,669	7,046

(Continued)

APPENDIX TABLE 66 - Continued

District[a]	Total[b]	Dessert[b]	Table		
			Total	Red	White[b]
	1	2	3	4	5
	Thousand Gallons				
1945	1945				
State total	116,675	84,992	31,683	19,837	11,846
Interior Valley	84,191	74,116	10,075	3,234	6,841
Southern California	9,515	7,154	2,361	1,662	699
Coast Counties	22,969	3,722	19,247	14,941	4,306
North of Bay	17,989	2,196	15,793	12,786	3,007
South of Bay	4,980	1,526	3,454	2,155	1,299
Interior Valley	84,191	74,116	10,075	3,234	6,841
Central Valley	31,004	26,724	4,280	1,842	2,438
San Joaquin Valley	53,187	47,392	5,795	1,392	4,403
1944	1944				
State total	857	59,696	31,286	21,972	9,314
Interior Valley	60,847	51,384	9,463	4,874	4,589
Southern California	9,860	6,111	3,749	3,078	671
Coast Counties	20,275	2,201	18,074	14,020	4,054
North of Bay	15,927	1,095	14,832		2,860
South of Bay	4,348	1,106	3,242	11,972	1,194
Interior Valley	60,847	51,384	9,463	4,874	4,589
Central Valley	25,375	20,317	5,058	2,366	2,692
San Joaquin Valley	35,472	31,067	4,405	2,508	1,897

[a] For list of counties in districts see Table 65.

[b] Gross production is preliminary for 6 months only, July 1 to December 31, making no allowance for losses for diversion for distilling and other by-product uses, for increases resulting from a amelioration and fortification etc. Gross production of red table for all years is unadjusted, and white table wine and dessert is adjusted for 1945-1949 by removing sherry and other dessert wine stock from white table wine production as reported by Institute, and adding it to dessert wine production as reported by Institute after raising it to approximate equivalent gallonage after fortification by dividing it - the dessert stock - by 0.85.

Source: Compiled by S. W. Shear, Giannini Foundation of Agricultural Economics, March 1950 from Wine Institute Annual Wine Industry Statistical Surveys, Part I.

APPENDIX TABLE 67
EQUIVALENT TONNAGE OF GRAPES USED IN CALIFORNIA COMMERCIAL GROSS PRODUCTION STILL WINES, DESSERT, AND RED AND WHITE TABLE BY DISTRICTS
JULY 1-DECEMBER 31, 1944-1949

District[a]/	Wine Production, Gross				
			Table		
	Total	Dessert	Total	Red	White
	Equivalent tons fresh grapes				
	1	2	3	4	5
Average 1945-1948	Average 1945 - 1948				
State, Total	1,265,100	1,066,000	199,100	133,400	65,700
Interior Valley	1,030,100	963,100	67,000	31,500	35,500
Southern California	81,000	64,600	16,400	12,500	3,900
Coast Counties	154,200	38,400	115,800	89,400	26,400
North of Bay	117,100	20,600	96,500	77,600	18,900
South of Bay	37,100	17,800	19,300	11,800	7,500
Interior Valley	1,030,100	963,100	67,000	31,500	35,500
Central Valley	360,400	333,400	27,000	14,700	12,300
San Joaquin Valley	669,700	629,700	40,000	16,800	23,200
1949	1949				
State, Total	927,000	763,300	163,700	118,000	45,700
Interior Valley	739,300	684,600	54,700	27,200	27,500
Southern California	82,100	63,500	18,600	17,600	1,000
Coast Counties	105,600	15,200	90,400	73,200	17,200
North of Bay	84,800	7,600	77,200	63,700	13,500
South of Bay	20,800	7,600	13,200	9,500	3,700
Interior Valley	739,300	684,600	54,700	27,200	27,500
Central Valley	252,400	235,600	16,800	10,800	6,000
San Joaquin Valley	486,900	449,000	37,900	16,400	21,500
1948	1948				
State, Total	1,346,400	1,168,300	178,100	136,600	41,500
Interior Valley	1,120,200	1,075,000	45,200	27,600	17,600
Southern California	72,100	54,800	17,400	13,500	3,900
Coast Counties	154,100	38,500	115,500	95,500	20,000
North of Bay	120,500	20,700	99,800	83,800	16,000
South of Bay	33,500	17,800	15,700	11,700	4,000
Interior Valley	1,120,200	1,075,000	45,200	27,600	17,600
Central Valley	380,100	367,600	16,700	13,300	3,400
San Joaquin Valley	735,900	707,400	28,500	14,300	14,200
1947	1947				
State, Total	978,500	825,400	153,100	113,800	39,300
Interior Valley	797,100	754,700	42,400	25,300	17,100
Southern California	55,300	39,800	15,500	12,700	2,800
Coast Counties	126,100	30,900	95,200	75,800	19,400
North of Bay	94,800	15,600	79,200	65,500	13,700
South of Bay	31,300	15,300	16,000	10,300	5,700
Interior Valley	797,100	754,700	42,400	25,300	17,100
Central Valley	320,800	306,900	13,900	8,000	5,900
San Joaquin Valley	476,300	447,800	28,500	17,300	11,200

(Continued)

APPENDIX TABLE 67 (Cont'd)

EQUIVALENT TONNAGE OF GRAPES USED IN CALIFORNIA COMMERCIAL GROSS PRODUCTION STILL WINES, DESSERT, AND RED AND WHITE TABLE BY DISTRICTS JULY 1-DECEMBER 31, 1944-1949

District[a]/	Wine Production, Gross				
			Table		
	Total	Dessert	Total	Red	White
	Equivalent Tons Fresh Grapes				
	1	2	3	4	5
1946	1946				
State, Total	1,654,600	1,375,800	278,800	166,400	112,400
Interior Valley	1,363,400	1,242,400	121,000	54,100	66,900
Southern California	107,100	88,400	18,700	13,900	4,800
Coast Counties	184,100	45,000	139,100	98,400	40,700
North of Bay	136,900	22,900	114,000	85,800	28,200
South of Bay	47,100	22,000	25,100	12,600	12,500
Interior Valley	1,363,400	1,242,400	121,000	54,100	66,900
Central Valley	429,600	377,500	52,100	26,600	25,500
San Joaquin Valley	933,700	864,800	68,900	27,500	41,400
1945	1945				
State, Total	1,081,100	894,700	186,400	116,700	69,700
Interior Valley	839,500	780,200	59,300	19,000	40,300
Southern California	89,200	75,300	13,900	9,800	4,100
Coast Counties	152,400	39,200	113,200	87,900	25,300
North of Bay	116,000	23,100	92,900	75,200	17,700
South of Bay	36,400	16,100	20,300	12,700	7,600
Interior Valley	839,500	780,200	59,300	19,000	40,300
Central Valley	306,500	281,300	25,200	10,800	14,400
San Joaquin Valley	533,000	498,900	34,100	8,200	25,900
1944	1944				
State, Total	812,500	628,400	184,100	129,300	54,800
Interior Valley	596,600	540,900	55,700	28,700	27,000
Southern California	86,400	64,300	22,100	18,100	4,000
Coast Counties	129,500	23,200	106,300	82,500	23,800
North of Bay	98,700	11,500	87,200	70,400	16,800
South of Bay	30,800	11,700	19,100	12,100	7,000
Interior Valley	596,600	540,900	55,700	28,700	27,000
Central Valley	243,600	213,900	29,700	13,900	15,800
San Joaquin Valley	353,000	327,000	26,000	14,800	11,200

Source: Computed by S. W. Shear, Giannini Foundation of Agricultural Economics, March 1950, from gallonage data in preceding table 67 on gross wine production July 1-December 31 adjusted 1945-1949 by removing sherry and other dessert wine stock from white table wine production as published and adding it to dessert wine production as published, after raising it to approximate equivalent gallonage after fortification by dividing it - the dessert stock - by 0.85. Conversion factors, gallons per ton table wine 170 and dessert wine 95. Data do not include an estimate of tonnage used in making beverage brandy and any neutral spirits not used for fortifying the adjusted gallonage of dessert wine during 6 months July 1 - December 31.

[a]/ For list of counties in districts see footnote to table 65.

APPENDIX TABLE 68

WEEKLY GRAPE CRUSH OF CALIFORNIA WINERIES BY VARIETAL CLASSES AND CHIEF RAISIN AND WINE VARIETIES BY DISTRICTS, 1949

Week Ending	Raisin Varieties			Table	Wine Varieties				All Varieties			Per Cent of All Varieties		
	Muscat	Seedless	All	All	State	By Districts[a]			By Weeks	Cumulated		Raisin	Table	Wine
						Interior Valley	Central Coast	Southern California		Quantity	Per Cent			
	State Totals								State Totals					
	1	2	3	4	5	6	7	8	9	10	11	12	13	14
	Tons										Per Cent			
To August 20	0	9,037	9,037	4,881	499	499	0	0	14,417	14,417	1.8	62.7	33.8	3.5
" 27	101	3,357	3,458	1,770	3,534	3,534	0	0	8,762	23,179	2.8	39.5	20.2	40.3
Sept. 1	451	8,094	8,545	1,120	6,864	6,636	0	228	16,529	39,708	4.8	1.7	6.8	41.5
" 9	190	9,340	9,530	2,138	11,008	8,625	466	1,917	22,676	62,384	7.6	42.0	9.4	48.6
" 17	840	16,324	17,164	4,201	24,072	17,503	1,523	5,046	45,437	107,821	13.1	37.8	9.2	53.0
" 24	3,808	20,302	24,110	5,839	39,736	24,542	8,340	6,854	69,685	177,506	21.5	34.6	8.4	57.0
Oct. 1	6,410	23,973	30,383	13,593	60,312	36,074	15,611	8,627	104,288	281,794	34.1	29.1	13.1	57.8
" 8	9,038	24,625	33,663	29,047	65,107	39,251	17,780	8,076	127,817	409,611	49.6	26.4	22.7	50.9
" 15	15,773	15,108	30,881	39,358	62,061	40,548	13,086	8,427	132,300	541,911	65.6	23.3	29.8	46.9
" 22	15,387	5,996	21,383	48,199	47,052	33,500	5,406	8,146	116,634	658,545	79.7	18.3	41.4	40.3
" 29	6,821	2,748	9,569	42,900	36,359	27,951	1,565	6,843	88,828	747,373	90.5	10.8	48.3	40.9
Nov. 5	3,265	833	4,098	21,007	14,913	10,323	148	4,442	40,018	787,391	95.3	10.2	52.5	37.3
" 12	911	265	1,176	8,160	2,999	2,200	32	767	12,335	799,726	96.8	9.5	66.2	24.3
" 19	607	136	743	7,676	1,376	1,376	0	0	9,795	809,521	98.0	7.6	78.4	14.0
" 26	624	45	669	4,536	316	316	0	0	5,521	815,042	98.7	12.1	82.2	5.7
Dec. 3	1,337	72	1,409	4,256	11	11	0	0	5,676	820,718	99.4	24.8	75.0	.2
" 10	3	56	59	3,311	33	33	0	0	3,403	824,121	99.8	1.7	97.3	1.0
" 17	0	147	147	1,706	0	0	0	0	1,853	825,974	100.0	7.9	92.1	0.0

a/ The district boundaries used by the Market News Service are approximately the same as used by Shear in this and other tables on tonnage crushed.

Season totals:

	1	2	3	4	5	6	7	8	9	
Sum of weekly[b]	65,566	140,458	206,024	243,698	376,252	252,922	63,957	59,373	825,974)	See footnotes Appendix Table 70 for further explanation.
Revised slightly[c]	65,054	140,695	205,749	246,788	376,078	252,932	63,675	59,471	828,615)	
Percent of final[d]	93.8	105.4	101.4	104.0	84.0	93.0	66.2	75.7	93.3)	
Final[e]	69,313	133,546	202,859	237,379	447,522	272,857	96,112	78,553	887,760)	

Source: Compiled by S. W. Shear, Giannini Foundation of Agricultural Economics, April 1950, from U.S.D.A. P.M.A., Fruit and Vegetable Branch Weekly Grape Crush Report No. 18, December 21, 1949, and No. 19, February 1, 1950.

APPENDIX TABLE 69

WEEKLY GRAPE CRUSH OF CALIFORNIA WINERIES BY VARIETAL CLASSES AND CHIEF RAISIN AND WINE VARIETIES BY DISTRICTS, 1948

Week Ending	Raisin Varieties			Table	Wine Varieties				All Varieties			Per Cent of All Varieties		
						By Districts a/				Cumulated				
	Muscat	Seedless	All	All	State	Interior Valley	Central Coast	Southern Calif.	By Weeks	Quantity	Per Cent	Raisin	Table	Wine
	State Totals									State Totals				
	1	2	3	4	5	6	7	8	9	10	11	12	13	14
	Tons											Per Cent		
To Aug. 21	0	6,879	6,879	3,120	0	0	0	.0	9,999	9,999	.8	68.8	31.2	0
" 28	23	2,019	2,042	1,741	1,287	1,287	0	0	5,070	15,069	1.2	40.3	34.3	25.4
Sept. 4	430	3,981	4,411	2,213	2,604	2,553	0	51	9,228	24,297	1.9	47.8	24.0	28.2
" 11	91	6,455	6,546	2,215	4,402	2,774	0	1,628	13,163	37,460	2.9	49.7	16.8	33.5
" 18	536	23,759	24,295	2,872	11,350	6,660	78	4,612	38,517	75,977	5.8	63.1	7.4	29.5
" 25	4,793	69,546	74,339	7,252	19,037	10,367	268	8,402	100,628	176,605	13.6	73.9	7.2	18.9
Oct. 2	10,180	78,919	89,099	7,604	32,624	22,317	849	9,458	129,327	305,932	23.6	68.9	5.9	25.2
" 9	17,300	66,284	83,584	10,641	42,346	29,660	4,070	8,616	136,571	442,503	34.1	61.2	7.8	31.0
" 16	19,642	51,006	70,648	14,629	55,329	36,324	10,393	8,612	140,606	583,109	44.9	50.2	10.4	39.4
" 23	22,673	35,519	58,192	40,223	72,127	45,691	20,433	6,003	170,542	753,651	58.0	34.1	23.6	42.3
" 30	21,458	23,319	44,777	50,524	71,857	47,382	20,465	4,010	167,158	920,809	70.9	26.8	30.2	43.0
Nov. 6	22,231	10,425	32,656	56,522	57,859	40,390	14,942	2,527	147,037	1,067,846	82.2	22.2	38.4	39.4
" 13	11,939	4,057	15,996	64,930	43,259	32,062	10,979	218	124,185	1,192,031	91.8	12.9	52.3	34.8
" 20	5,147	2,838	7,985	41,858	20,077	17,878	2,115	84	69,920	1,261,951	97.1	11.4	59.9	28.7
" 27	924	960	1,884	13,222	4,608	4,359	227	22	19,714	1,281,665	98.6	9.6	67.0	23.4
Dec. 4	1,075	950	2,025	4,563	1,185	1,185	0	0	7,773	1,289,438	99.2	26.1	58.7	15.2
" 11	1,139	1,103	2,242	2,723	190	190	0	0	5,155	1,294,593	99.6	43.5	52.8	3.7
" 18	493	163	656	2,569	1	1	0	0	3,226	1,297,819	99.9	20.4	79.6	0.0
" 25	0	0	0	1,465	0	0	0	0	1,465	1,299,284	100.0	0.0	100.0	0.0
Season Totals:														
Sum of weekly b/	40,074	388,182	528,256	330,886	440,142	301,080	84,819	54,243	1,299,284)					
Revised slightly c/	141,459	384,371	525,830	330,351	446,810	308,461	84,610	53,732	1,302,991)					
Per Cent of Final d/	95.9	99.3	98.4	98.8	86.4	96.7	63.6	82.5	94.0)					
Final e/	147,559	387,050	534,609	334,359	517,305	318,455	133,734	65,116	1,386,283)					

See footnotes Appendix Table 70 for further explanation

Source: Compiled by S. W. Shear, Giannini Foundation of Agricultural Economics, University of California, April 1950, from Federal-State Market News Service, Marketing Grapes and Raisins, 1948 season, p. 66-67.

APPENDIX TABLE 70

WEEKLY GRAPE CRUSH OF CALIFORNIA WINERIES BY VARIETAL CLASSES AND WINE VARIETIES BY DISTRICTS, 1947

Week Ending	Raisin All	Table All	Wine Varieties				All Varieties, State			Per Cent of All Varieties		
			State	By Districts[a]			By Weeks	Cumulated		Raisin	Table	Wine
				Interior Valley	Central Coast	Southern California		Quantity	Per Cent			
	State Totals						State Totals					
	1	2	3	4	5	6	7	8	9	10	11	12
	Tons									Per Cent		
To Aug. 16	7,504	4,402	3,381	3,357	24	0	15,287	15,287	1.7	49.1	28.8	22.1
" 23	3,815	2,286	4,623	4,592	31	0	10,724	26,011	2.9	35.6	21.3	43.1
" 30	6,595	1,497	6,364	5,906	136	387	14,458	40,469	4.5	45.6	10.4	44.0
Sept. 6	13,341	1,828	10,772	7,240	1,243	2,482	25,941	66,410	7.4	51.4	7.1	41.5
" 13	26,050	5,198	37,753	25,120	7,023	6,101	69,001	135,411	15.2	37.8	7.5	54.7
" 20	35,449	8,730	50,319	30,518	12,132	8,163	94,498	229,909	25.8	37.5	9.2	53.3
" 27	29,259	14,934	63,660	36,492	18,728	8,737	107,853	337,762	37.9	27.1	13.9	59.0
Oct. 4	31,842	22,263	54,946	34,124	13,927	7,165	109,051	446,813	50.1	29.2	20.4	50.4
" 11	24,453	33,200	41,787	29,267	6,451	6,294	99,440	546,253	61.2	24.6	33.4	42.0
" 18	22,175	42,636	38,914	28,083	5,205	5,727	103,725	649,978	72.8	21.4	41.1	37.5
" 25	16,817	58,001	30,814	26,731	1,828	2,406	105,632	755,610	84.7	15.9	54.9	29.2
Nov. 1	9,158	32,915	15,827	15,334	144	349	57,900	813,510	91.2	15.8	56.9	27.3
" 8	3,806	23,405	10,349	10,269	80	64	37,560	851,070	95.4	10.1	62.3	27.6
" 15	890	14,642	5,562	5,562	0	22	21,094	872,164	97.7	4.2	69.4	26.4
" 22	496	8,824	1,288	1,288	0	0	10,608	882,772	98.9	4.7	83.2	12.1
" 29	55	5,318	193	193	0	0	5,566	888,338	99.6	1.0	95.5	3.5
Dec. 6	42	2,862	15	15	0	0	2,919	891,257	99.9	1.4	98.1	0.5
" 13	5	813	0	0	0	0	818	892,075	99.95	0.6	99.4	0.0
" 20	0	258	0	0	0	0	258	892,333	99.99	0.0	100.0	0.0
" 27	0	11	0	0	0	0	11	892,344	100.0	0.0	100.0	0.0
Season Totals:												
Sum of Weekly[b]	231,752	284,023	376,567	261,091	66,952	47,897	892,344					
Revised Slightly[c]	248,163	286,230	374,241	264,462	66,591	43,188	908,634					
Per Cent of Final[d]	90.5	98.5	93.3	100.0	64.9	87.9	94.1					
Final[e]	274,323	290,650	400,983	249,173	102,653	49,157	965,956					

a/ The District boundaries used by the Market News Service are approximately the same as used by Shear in this and other tables on tonnage crushed in this report.

b/ Sum of uncorrected weekly data given above as reported currently by the Market News Service.

c/ The "revised slightly" season totals of the Market News Service given differ in some instances from the sum of the current weekly data because of later minor revisions.

d/ Per Cent "revised slightly" season totals of the Market News Service of final totals of the Wine Institute. Over 100 per cent reported for Interior Valley probably due to incorrect classification of weekly data.

e/ Final data as reported by the Wine Institute Twelfth Annual Wine Industry Statistical Survey, Part I. They are more complete than those reported to the Market News Service, but only season totals and no weekly data reported.

Source: Compiled by S. W. Shear, Giannini Foundation of Agricultural Economics, University of California, April 1950, from Federal-State Market News Service, Marketing Grapes and Raisins, 1948 season, p. 66-67.

APPENDIX TABLE 71

APPARENT CONSUMPTION OF CALIFORNIA WINES IN ALL MARKETS, CALIFORNIA AND OTHER STATES, TABLE AND DESSERT AND TOTAL, MONTHLY JULY 1937-FEBRUARY 1950

Year and Month	Foreign Wines	Wine Produced in California							
	U.S. Net Imports	Consumed in U.S.a/		Consumed in California			Consumed in Other States		
		Still Wine		Still Wine		Still and Sparkling	Still Wine		Still and Sparkling
	Still and Sparkling	Table	Dessertb/	Table	Dessertb/		Table	Dessertb/	
	1	2	3	4	5	6	7	8	9
		Wine Gallons							
1937									
July	248,223	1,216,133	2,275,303	506,959	758,067	1,269,187	709,174	1,517,236	2,229,619
August	197,437	1,404,239	2,280,482	533,146	841,292	1,380,116	871,093	1,439,190	2,312,756
September	248,041	1,730,926	3,430,133	575,174	958,943	1,537,792	1,155,752	2,471,190	3,631,113
October	384,470	2,123,157	4,353,150	665,231	1,127,930	1,797,692	1,457,926	3,225,220	4,688,002
November	455,999	2,113,213	4,845,666	708,940	1,287,802	2,006,761	1,404,273	3,557,864	4,972,471
December	658,345	1,761,090	4,369,429	702,674	1,332,697	2,050,239	1,058,416	3,036,732	4,101,652
Total	2,192,515	10,348,758	21,554,163	3,692,124	6,306,731	10,041,787	6,656,634	15,247,432	21,935,613
1938									
January	225,780	1,120,777	2,707,812	507,848	1,010,472	1,523,619	612,929	1,697,340	2,312,943
February	208,319	1,069,362	2,385,516	507,424	945,184	1,455,050	561,938	1,440,332	2,003,043
March	273,864	1,372,638	3,472,011	589,504	1,051,001	1,642,677	783,134	2,421,010	3,205,834
April	242,666	1,099,609	2,309,735	581,229	966,137	1,550,667	518,380	1,343,598	1,862,970
May	221,425	1,134,214	2,605,759	570,052	901,760	1,478,423	564,162	1,703,999	2,268,706
June	220,425	1,126,167	2,478,120	581,695	818,426	1,403,111	544,472	1,659,694	2,208,431
July	166,095	1,136,420	2,667,868	588,124	938,462	1,529,505	548,296	1,729,406	2,280,137
August	160,658	1,122,629	2,693,420	579,064	819,798	1,403,266	543,565	1,873,622	2,418,817
September	216,262	1,519,689	3,352,198	606,202	828,100	1,439,619	913,487	2,524,098	3,437,686
October	378,278	1,963,077	4,722,328	691,084	1,161,674	1,858,960	1,271,993	3,560,654	4,840,683
November	488,586	1,863,644	4,330,356	740,494	1,136,919	1,884,150	1,123,150	3,193,437	4,320,714
December	613,385	1,770,330	4,865,446	725,622	1,228,952	1,972,406	1,044,708	3,636,494	4,686,688
Total	3,415,763	16,298,556	38,590,569	7,268,342	11,806,885	19,141,453	9,030,214	26,783,684	35,848,652
1939									
January	268,895	1,237,141	3,261,328	570,367	1,012,758	1,588,244	666,754	2,248,570	2,920,207
February	212,162	1,353,436	3,129,956	512,216	898,254	1,413,193	841,220	2,231,702	3,073,940
March	312,198	1,470,910	3,659,199	583,851	1,021,529	1,608,405	887,059	2,637,670	3,525,962
April	335,429	1,293,929	3,303,981	530,175	836,244	1,370,290	763,754	2,467,737	3,233,096
May	264,847	1,231,678	3,179,571	570,995	911,011	1,489,280	660,683	2,268,560	2,930,865
June	241,890	1,275,487	2,972,648	561,802	826,482	1,396,506	713,685	2,146,166	2,860,934
July	173,828	1,173,637	2,703,535	514,911	739,983	1,259,871	658,726	1,963,552	2,623,256
August	177,466	1,454,026	3,511,058	599,622	821,130	1,427,824	854,404	2,689,928	3,546,937
September	502,701	1,731,776	4,620,747	583,745	925,316	1,516,041	1,148,031	3,695,431	4,846,399
October	427,833	1,935,968	5,605,920	643,183	1,113,162	1,765,878	1,292,785	4,492,758	5,792,857
November	458,239	2,234,694	5,383,509	713,931	1,052,428	1,781,734	1,520,763	4,331,081	5,862,358
December	553,552	1,815,612	4,903,513	694,358	1,088,836	1,804,128	1,121,254	3,814,677	4,944,396
Total	3,929,040	18,208,294	46,234,965	7,079,176	11,247,133	18,421,394	11,129,118	34,987,832	46,161,207

(Continued)

APPARENT CONSUMPTION OF CALIFORNIA WINES IN ALL MARKETS, CALIFORNIA AND OTHER STATES, TABLE AND DESSERT AND TOTAL, MONTHLY JULY 1937-FEBRUARY 1950

Year and Month	Foreign Wines	Wine Produced in California							
	U.S. Net Imports	Consumed in U.S.[a]		Consumed in California			Consumed in Other States		
		Still Wine		Still Wine		Still and Sparkling	Still Wine		Still and Sparkling
	Still and Sparkling	Table	Dessert[b]	Table	Dessert[b]		Table	Dessert[b]	
	1	2	3	4	5	6	7	8	9
		Wine Gallons							
1940									
January	336,838	1,433,029	4,034,443	593,872	1,090,587	1,691,267	839,157	2,943,856	3,786,700
February	250,902	1,424,662	4,232,464	565,994	937,376	1,513,537	858,668	3,295,088	4,155,759
March	266,080	1,369,559	4,171,646	576,355	984,924	1,566,746	793,204	3,186,722	3,981,885
April	277,358	1,415,534	3,623,024	581,725	927,568	1,514,641	833,809	2,695,456	3,530,524
May	344,648	1,368,246	3,688,756	580,420	893,842	1,486,171	787,826	2,794,914	3,584,244
June	765,128	1,430,765	8,160,960	680,548	2,068,062	2,758,480	750,217	6,092,898	6,846,270
July	224,464	1,155,488	2,212,201	485,364	465,113	954,917	670,124	1,747,088	2,418,913
August	118,555	1,313,351	2,806,741	596,807	603,121	1,206,760	716,544	2,203,620	2,927,205
September	166,949	1,818,792	4,693,208	598,704	755,582	1,364,718	1,220,088	3,937,626	5,166,503
October	303,862	2,269,717	5,494,518	683,957	1,028,728	1,724,423	1,585,760	4,465,790	6,069,204
November	250,997	2,264,526	7,018,375	732,026	1,204,867	1,962,514	1,532,500	5,813,508	7,376,676
December	301,376	2,066,815	6,009,928	731,275	1,223,442	1,986,621	1,335,540	4,786,486	6,142,530
Total	3,607,157	19,330,484	56,146,264	7,407,047	12,183,212	19,730,795	11,923,437	43,963,052	55,986,413
1941									
January	129,977	1,522,034	4,342,132	592,351	1,096,784	1,692,836	929,683	3,245,348	4,182,660
February	113,710	1,527,098	4,778,822	564,098	950,442	1,518,239	963,000	3,828,380	4,800,684
March	146,565	1,695,653	5,625,322	627,844	1,166,814	1,802,867	1,067,809	4,458,508	5,532,186
April	141,162	1,555,376	5,482,081	617,784	1,090,333	1,713,442	937,592	4,392,048	5,338,109
May	164,345	1,528,558	5,252,191	573,022	1,008,687	1,591,439	955,536	4,243,504	5,210,403
June	130,369	1,586,446	6,407,506	596,715	1,215,280	1,820,718	989,731	5,192,226	6,188,302
July	173,802	1,617,141	5,295,532	651,685	1,078,712	1,741,783	965,456	4,216,820	5,194,793
August	92,955	1,719,273	5,075,570	627,353	998,940	1,640,238	1,091,920	4,075,630	5,179,673
September	143,005	2,136,141	6,784,202	704,075	1,240,418	1,965,184	1,432,066	5,543,784	7,008,544
October	194,000	2,352,099	6,388,537	698,696	1,080,195	1,797,934	1,653,403	5,308,342	6,992,253
November	161,000	2,252,663	5,636,353	716,706	1,010,253	1,743,454	1,535,957	4,626,100	6,191,483
December	225,000	2,375,771	6,055,106	714,893	1,130,310	1,870,451	1,660,878	4,874,796	6,557,431
Total	1,815,890	21,868,253	67,123,354	7,685,222	13,066,868	20,898,585	14,183,031	54,006,486	68,376,521
1942									
January	66,804	1,634,786	5,399,880	581,236	1,045,844	1,629,508	1,053,550	4,354,036	5,416,196
February	56,607	1,239,039	5,828,175	518,418	1,057,926	1,579,186	720,621	4,770,249	5,496,969
March	83,598	1,913,958	6,878,285	617,894	1,181,066	1,802,287	1,296,064	5,697,219	6,998,462
April	56,546	1,903,157	5,866,089	628,228	1,041,280	1,672,012	1,274,929	4,824,809	6,105,492
May	58,223	1,674,576	5,003,881	577,825	847,514	1,428,385	1,096,751	4,156,367	5,259,091
June	42,549	1,586,873	5,183,756	562,398	879,832	1,445,772	1,024,475	4,303,924	5,331,940
July	41,926	1,635,800	5,854,479	539,729	790,214	1,335,962	1,096,071	5,064,265	6,167,735
August	49,808	1,808,560	5,984,677	527,124	913,318	1,452,528	1,281,436	5,071,359	6,360,263
September	73,633	2,357,167	7,259,338	690,190	1,577,548	2,286,692	1,666,977	5,681,790	7,360,662
October	104,317	2,575,687	6,608,834	717,812	1,402,949	2,140,031	1,857,875	5,205,885	7,081,674
November	154,815	2,301,728	6,104,057	637,346	997,888	1,654,096	1,664,382	5,106,169	6,790,664
December	235,388	2,732,092	6,545,470	816,601	1,193,458	2,032,517	1,915,491	5,352,012	7,291,023
Total	1,024,214	23,363,423	72,516,921	7,414,801	12,928,837	20,458,976	15,948,622	59,588,084	75,660,171

(Cont'd.)

APPENDIX TABLE 71 (Cont'd)

APPARENT CONSUMPTION OF CALIFORNIA WINES IN ALL MARKETS, CALIFORNIA AND OTHER STATES, TABLE AND DESSERT AND TOTAL, MONTHLY JULY 1937-FEBRUARY 1950

Year and Month	Foreign Wines	Wine Produced in California							
	U. S. Net Imports	Consumed in U. S.a/		Consumed in California			Consumed in Other States		
		Still Wine		Still Wine		Still and Sparkling	Still Wine		Still and Sparkling
	Still and Sparkling	Table	Dessert	Table	Dessert		Table	Dessert	
	1	2	3 b/	4	5 b/	6	7	8 b/	9
	Wine Gallons								
1943									
January	113,688	2,253,920	5,704,205	562,741	1,083,838	1,653,672	1,691,179	4,620,367	6,331,478
February	149,596	2,218,906	4,923,742	581,044	881,688	1,470,394	1,637,862	4,042,054	5,695,959
March	191,705	2,434,402	4,327,185	605,733	887,676	1,507,512	1,828,669	3,439,509	5,277,517
April	194,321	2,118,539	4,282,033	572,815	749,802	1,334,033	1,545,724	3,532,231	5,095,445
May	240,314	1,981,634	4,079,103	551,011	719,808	1,288,850	1,430,623	3,359,295	4,809,209
June	238,514	1,938,886	4,020,090	634,487	827,986	1,488,904	1,304,399	3,192,104	4,530,091
July	280,728	1,773,050	3,589,804	546,002	602,871	1,169,701	1,227,048	2,986,333	4,242,304
August	292,623	1,840,337	4,100,204	600,207	899,994	1,526,728	1,240,130	3,200,210	4,467,401
September	354,384	1,450,960	3,107,194	461,381	628,470	1,109,132	989,579	2,478,724	3,495,346
October	569,589	1,610,738	3,324,867	482,151	792,706	1,293,259	1,128,587	2,532,161	3,703,113
November	705,037	1,867,519	3,389,872	469,099	534,894	1,024,680	1,398,420	2,854,978	4,279,719
December	855,815	2,199,052	4,285,876	653,316	1,049,756	1,750,259	1,545,736	3,236,120	4,831,646
Total	4,186,314	23,687,943	49,134,175	6,719,987	9,659,489	16,617,124	16,967,956	39,474,686	56,759,228
1944									
January	833,340	2,017,181	3,792,153	486,918	784,732	1,287,707	1,530,263	3,007,421	4,561,929
February	933,537	1,945,549	3,656,652	531,657	806,746	1,360,989	1,413,892	2,849,906	4,296,648
March	976,280	2,357,393	4,474,446	524,609	836,975	1,377,322	1,832,784	3,637,471	5,505,946
April	1,097,922	1,986,196	3,493,839	536,987	643,912	1,202,922	1,449,209	2,849,927	4,342,002
May	1,033,994	2,510,448	5,011,729	614,516	1,053,748	1,690,727	1,895,932	3,957,981	5,885,965
June	977,515	1,995,484	3,974,478	553,724	775,637	1,340,044	1,441,760	3,198,841	4,663,936
July	551,679	2,028,547	3,552,486	516,654	755,940	1,284,740	1,511,893	2,796,546	4,347,641
August	446,070	1,887,162	4,303,385	600,344	1,089,303	1,719,106	1,286,818	3,214,082	4,548,374
September	289,608	1,544,920	4,016,194	444,931	820,025	1,286,655	1,099,989	3,196,169	4,334,044
October	371,411	1,601,971	4,696,111	450,382	1,207,475	1,675,521	1,151,509	3,488,636	4,685,651
November	324,438	1,870,744	4,470,417	484,126	1,126,250	1,628,528	1,386,618	3,344,167	4,777,312
December	337,135	1,653,830	5,383,674	447,215	1,382,570	1,852,703	1,206,615	4,001,104	5,237,833
Total	8,172,929	23,399,425	50,825,564	6,192,063	11,283,313	17,706,964	17,207,362	39,542,251	57,187,286
1945									
January	248,096	1,889,961	5,386,934	527,433	1,611,019	2,148,889	1,362,528	3,775,915	5,160,706
February	272,774	1,820,609	5,251,466	477,011	1,007,918	1,508,140	1,343,598	4,243,548	5,622,104
March	251,913	1,886,156	5,769,044	457,512	1,146,506	1,618,207	1,428,644	4,622,538	6,081,617
April	225,928	1,875,293	5,162,071	476,614	990,723	1,481,394	1,398,679	4,171,348	5,595,545
May	263,762	1,435,524	5,160,925	403,309	1,020,943	1,435,151	1,032,215	4,139,982	5,193,369

(Continued)

APPENDIX TABLE 71 (Cont'd)

APPARENT CONSUMPTION OF CALIFORNIA WINES IN ALL MARKETS, CALIFORNIA AND OTHER STATES, TABLE AND DESSERT AND TOTAL, MONTHLY JULY 1937-FEBRUARY 1950

Year and Month	Foreign Wines	Wine Produced in California							
	U. S. Net Imports	Consumed in U. S.a/		Consumed in California			Consumed in Other States		
	Still and Sparkling	Still Wine		Still Wine		Still and Sparkling	Still Wine		Still and Sparkling
		Table	Dessert	Table	Dessert		Table	Dessert	
	1	2	3 b/	4	5 b/	6	7	8 b/	9
	Wine Gallons								
June	170,308	1,154,499	4,202,983	320,526	853,081	1,183,971	833,973	3,349,903	4,211,563
July	102,044	1,087,860	3,860,654	314,306	712,941	1,044,973	773,554	3,147,713	3,946,951
August	149,485	1,033,512	3,691,699	286,527	710,411	1,024,014	746,985	2,981,288	3,772,194
September	140,896	1,105,575	3,289,038	275,651	439,431	723,800	829,925	2,849,607	3,710,768
October	245,114	3,158,452	5,302,992	413,173	691,917	1,119,543	2,745,274	4,611,075	7,426,487
November	344,659	2,120,734	6,676,450	528,978	1,486,532	2,052,292	1,591,756	5,189,918	6,853,533
December	289,731	1,969,358	6,066,896	445,023	1,362,331	1,856,090	1,524,335	4,704,565	6,277,586
Total	2,704,710	20,537,534	59,821,153	4,926,068	12,033,753	17,196,469	15,611,466	47,787,400	63,852,423
1946									
January	297,902	1,864,562	6,632,143	499,791	957,562	1,467,250	1,364,771	5,674,581	7,077,638
February	160,904	1,887,990	6,901,684	451,123	1,172,769	1,635,043	1,436,867	5,728,915	7,201,772
March	314,150	2,518,520	9,183,523	521,031	1,883,523	2,419,029	1,997,489	7,300,000	9,328,341
April	364,382	2,607,275	8,617,385	587,636	1,740,885	2,344,600	2,019,639	6,876,500	8,924,330
May	541,704	2,551,970	7,487,847	523,920	1,310,614	1,847,791	2,028,050	6,177,233	8,241,692
June	469,528	2,640,540	7,722,432	514,356	1,257,553	1,795,317	2,126,184	6,464,879	8,641,046
July	580,028	2,082,817	6,968,779	409,663	1,069,807	1,493,382	1,673,154	5,898,972	7,617,117
August	470,696	2,458,129	7,717,174	481,637	1,204,637	1,707,447	1,976,492	6,506,537	8,545,033
September	357,471	1,968,283	7,762,212	455,960	1,016,827	1,483,985	1,512,323	6,745,385	9,303,466
October	489,152	2,362,308	8,751,153	506,659	1,182,180	1,722,203	1,855,649	7,574,973	9,509,983
November	554,996	2,254,360	8,340,427	601,591	1,287,829	1,926,640	1,652,769	7,052,598	8,770,902
December	415,314	2,244,516	8,352,621	524,832	1,114,472	1,668,395	1,719,684	7,238,149	9,012,438
Total	5,016,227	27,441,270	94,437,380	6,078,199	15,198,658	21,511,082	21,363,071	79,238,722	101,173,758
1947									
January	274,793	1,785,757	5,378,035	508,745	823,925	1,343,330	1,277,012	4,554,110	5,843,989
February	238,045	1,300,630	4,311,412	323,808	468,180	794,923	976,822	3,843,232	4,829,397
March	273,669	1,483,624	4,304,684	380,835	741,794	1,128,250	1,102,789	3,562,890	4,679,194
April	179,385	1,074,034	3,379,224	316,306	604,061	923,828	757,728	3,375,163	4,141,666
May	185,015	1,038,194	4,039,106	305,640	594,572	909,173	732,554	3,444,534	4,190,875
June	140,832	1,153,128	4,561,368	310,074	748,081	1,063,386	843,054	3,813,287	4,661,977
July	108,698	1,162,484	5,046,772	344,098	750,297	1,101,777	818,386	4,296,475	5,126,118
Auguest	125,694	1,163,409	5,376,030	313,534	775,661	1,094,894	849,875	4,600,369	5,466,315
September	215,558	1,495,773	6,478,512	332,214	982,569	1,323,695	1,163,559	5,495,943	6,670,487
October	202,628	1,986,481	9,034,787	495,615	1,275,228	1,785,253	1,490,866	7,759,559	9,285,958
November	166,050	2,058,045	8,342,077	414,823	1,159,439	1,593,866	1,643,222	7,182,638	8,857,191
December	156,806	1,986,488	7,355,198	489,674	1,039,411	1,548,468	1,496,814	6,315,787	7,844,596
Total	2,267,173	17,688,047	68,207,205	4,535,366	9,963,218	14,610,843	13,152,681	58,243,987	71,597,763

(Cont'd.)

APPENDIX TABLE 71 (Cont'd)

APPARENT CONSUMPTION OF CALIFORNIA WINES IN ALL MARKETS, CALIFORNIA AND OTHER STATES, TABLE AND DESSERT AND TOTAL, MONTHLY JULY 1937-FEBRUARY 1950

Year and Month	Foreign Wines	Wine Produced in California							
	U. S. Net Imports	Consumed in U. S.a/		Consumed in California			Consumed in Other States		
	Still and Sparkling	Still Wine		Still Wine		Still and Sparkling	Still Wine		Still and Sparkling
		Table	Dessert	Table	Dessert		Table	Dessert	
	1	2	3 b/	4	5 b/	6	7	8 b/	9
	Wine Gallons								
1948									
January	262,044	1,657,728	7,337,189	356,804	1,165,989	1,549,102	1,300,924	6,151,200	7,469,599
February	172,076	1,454,298	7,008,146	332,210	974,817	1,310,404	1,122,088	6,033,329	7,176,512
March	224,558	1,675,804	8,063,857	450,192	1,380,152	1,839,876	1,225,612	6,683,705	7,922,357
April	208,428	1,618,004	7,766,467	418,225	1,254,083	1,677,959	1,199,779	6,512,384	7,726,817
May	190,372	1,626,415	6,179,329	378,607	906,880	1,299,784	1,247,808	5,272,449	6,531,918
June	214,510	1,391,354	6,667,169	423,199	1,136,137	1,572,909	968,155	5,531,032	6,513,076
July	156,722	1,257,888	5,051,260	322,958	804,932	1,135,212	934,930	4,246,328	5,199,946
August	221,116	1,280,986	6,383,381	406,524	1,120,991	1,534,461	874,462	5,262,390	6,156,184
September	257,076	1,621,694	8,189,278	465,491	1,178,663	1,661,304	1,156,203	7,010,615	8,194,324
October	306,723	1,999,134	8,279,740	494,961	1,146,866	1,654,528	1,504,173	7,132,874	8,674,293
November	295,295	2,249,187	9,436,154	541,025	1,295,707	1,855,589	1,708,162	8,140,447	9,882,081
December	391,617	2,220,544	7,485,720	581,790	1,124,037	1,735,340	1,638,754	6,361,683	8,024,292
Total	2,900,537	20,053,036	87,847,690	5,171,986	13,509,254	18,826,468	14,881,050	74,338,436	89,471,399
1949									
January	235,032	1,737,060	7,613,178	430,307	1,311,745	1,751,207	1,306,753	6,301,434	7,628,092
February	242,178	1,626,770	7,597,233	461,253	1,228,024	1,693,595	1,165,517	6,369,209	7,554,778
March	274,578	1,994,177	8,363,564	500,565	1,301,609	1,809,651	1,493,611	7,061,955	8,575,562
April	269,554	1,651,128	7,509,923	446,185	1,122,687	1,575,030	1,204,943	6,387,236	7,604,982
May	247,819	1,566,293	6,585,703	428,389	1,004,749	1,439,677	1,137,903	5,580,954	6,732,474
June	205,228	1,418,147	6,927,808	483,562	1,072,821	1,568,409	934,585	5,854,987	6,799,149
July	160,908	1,338,260	5,971,731	404,524	960,136	1,371,074	933,735	5,011,594	5,956,419
August	158,889	1,624,085	7,428,229	530,852	983,904	1,528,469	1,093,233	6,444,326	7,550,752
September	223,040	1,825,964	8,182,593	559,921	1,352,200	1,924,539	1,266,044	6,830,393	8,118,436
October	328,298	2,372,171	10,244,222	564,978	1,669,158	2,256,028	1,807,194	8,575,065	10,416,830
November	426,145	2,245,928	9,806,251	578,598	1,247,276	1,846,895	1,667,330	8,558,975	10,260,097
December	420,886	2,096,886	9,595,757	591,081	1,523,524	2,137,440	1,505,806	8,072,233	9,601,155
Total	3,194,555	21,496,869	95,826,192	5,980,215	14,777,833	20,902,014	15,516,654	81,048,361	96,798,726
1950									
January	264,000	1,887,210	9,166,255	457,894	1,391,520	1,857,739	1,429,316	7,774,734	9,221,170
February	259,000	1,713,657	7,336,319	414,792	833,315	1,253,158	1,298,865	6,503,004	7,814,949

a/ Consumed in United States and the small quantity exported.
b/ Dessert wine includes vermouth.

Source: Compiled by Giannini Foundation of Agricultural Economics, University of California, April 1950, from Wine Institute Annual Wine Industry Statistical Surveys Part I.

APPENDIX TABLE 72

UNITED STATES WINE IMPORTS FOR CONSUMPTION BY KINDS, YEARS BEGINNING JULY 1, 1933-1948

Years Beginning July 1	Total	Champagne and Other Sparkling	Still Wines							
			Total	Table, 14 Per Cent or Less	Dessert, Over 14 Per Cent and Not Over 24 Per Cent Alcohol					
					Total	Vermouth[a/]	Except Vermouth			
							Total	Sake[b/]	N.e.s.[a/]	Other
	1	2	3	4	5	6	7	8	9	10
	Wine Gallons									
Averages:										
1936-1939	4,010,783	574,864	3,435,919	1,024,960	2,410,959	1,387,656	1,023,303	122,924	3,059	897,320
1940-1942	1,728,104	151,748	1,576,356	268,417	1,307,939	563,981	743,958	27,881	2,153	713,924
1943-1945	5,361,462	165,012	5,196,450	426,802	4,769,648	714,207	4,055,441	41	1,733	4,053,667
1946-1948	3,169,904	348,660	2,821,244	857,086	1,964,158	1,000,495	963,663	209	21,328	942,126
Annual:										
1933	3,155,381	352,453	2,802,928	- c/	- c/	1,000,000	- c/	120,480	500	- c/
1934	2,731,608	288,647	2,442,961	-	-	911,372	-	172,033	2,200	-
1935	2,809,710	282,267	2,527,443	-	-	944,000	-	145,478	2,200	-
1936[d/]	4,233,068	598,407	3,634,661	1,072,828	2,561,833	1,390,257	1,171,576	145,181	33,180	1,023,215
1937	3,596,754	543,070	3,053,684	970,649	2,083,035	1,153,912	929,123	124,661	1,822	802,640
1938	3,670,760	513,544	3,157,216	1,015,125	2,142,091	1,227,284	914,807	112,083	3,611	799,113
1939	4,542,551	644,437	3,898,114	1,041,236	2,856,878	1,779,171	1,077,707	109,770	3,624	964,313
1940	2,200,778	258,108	1,942,670	391,640	1,551,030	766,103	784,927	76,752	3,118	705,057
1941	1,194,985	89,541	1,105,444	190,887	914,557	436,542	478,015	6,891	3,203	467,921
1942	1,788,550	107,595	1,680,955	222,723	1,458,232	489,298	968,934	0	140	968,794
1943	8,910,764	89,818	8,820,946	598,808	8,222,138	688,892	7,533,246	0	4,623	7,528,623
1944	3,753,122	65,209	3,687,913	301,173	3,386,740	628,081	2,758,659	0	124	2,758,535
1945	3,420,499	340,007	3,080,492	380,426	2,700,066	825,650	1,874,416	124	450	1,873,342
1946	4,159,396	401,817	3,757,579	972,070	2,785,509	1,199,667	1,585,842	0	10,782	1,575,060
1947	2,247,422	233,823	2,013,599	568,268	1,445,331	765,233	680,098	0	15,944	664,154
1948	3,102,895	410,340	2,692,555	1,030,922	1,661,633	1,036,585	625,048	628	37,257	587,163

a/ Vermouth 1933 and N.e.s. 1933-1935 estimated by S. W. Shear. N.e.s. approximate totals - imports from only Hong Kong, China, Poland and Danzig - the chief sources since 1935.

b/ Sake totals 1933-1934 assumed as imports of all wine from Japan, as sake 1935-1941 was all or nearly all imported from Japan and total imports from Japan were nearly all sake.

c/ Dashes indicate data not reported separately.

d/ Year 1936-37 covers June 15, 1936-June 30, 1937 and hence includes June 15-30, imports also included in data for preceding year beginning July 1, 1935.

Source: Compiled by S. W. Shear, Giannini Foundation of Agricultural Economics, University of California, Berkeley, April 1950, directly or indirectly from latest revised monthly reports of U. S. Dept. Commerce, Bureau Foreign and Domestic Commerce: 1933-1935 from monthly mimeographed releases, Imports of Distilled Liquors, Wines, and Cordials, by Countries; 1936-1948 from compilations of the Wine Institute from Department of Commerce records of final monthly data by countries. Imports for consumption, total - dutiable plus the small amount free of duty (less than 1 per cent of total in most years).

APPENDIX TABLE 73

UNITED STATES IMPORTS FOR CONSUMPTION OF TABLE WINE CONTAINING 14% OR LESS ALCOHOL BY CHIEF COUNTRIES OF ORIGIN, YEARS BEGINNING JULY 1, 1936-1948

Year Beginning July 1	Total[a]/	France	Italy	Spain	Portugal	Germany	Hungary	Greece	Switzerland	Argentina	Chile	Other[b]/
	1	2	3	4	5	6	7	8	9	10	11	12
	Wine Gallons[a]/											
Averages:												
1936-1939	1,024,960	530,458	298,134	10,942	930	128,065	14,496	9,808	3,052	1,168	7,051	20,856
1940-1942	268,417	114,609	35,739	10,925	18,358	18,376	2,001	4,285	7,992	14,278	19,024	22,780
1943-1945	426,802	36,582	23,064	39,054	57,198	1,871	0	14	12,022	79,513	116,169	61,315
1946-1948	857,086	285,854	307,139	19,727	22,198	40,293	1,812	22,088	12,968	19,071	114,960	10,976
Annual:												
1936	1,072,828	514,144	281,048	15,369	2,387	162,915	16,720	9,207	2,935	1,526	14,027	52,550
1937	970,649	449,401	304,728	12,935	824	153,740	15,338	8,752	1,753	2,042	7,202	13,934
1938	1,015,125	503,144	287,512	9,934	179	172,516	12,937	10,455	3,215	881	3,454	10,898
1939	1,041,236	655,143	319,250	5,532	329	23,089	12,990	10,818	4,303	222	3,520	6,040
1940	391,640	207,649	77,269	16,293	17,737	26,715	4,871	7,009	7,289	10,641	13,244	2,923
1941	190,887	80,970	16,282	7,131	17,447	16,290	719	4,126	9,017	11,348	25,176	2,381
1942	222,723	55,207	13,816	9,350	19,888	12,124	414	1,720	7,670	20,845	18,653	63,035
1943	598,808	13,233	8,945	43,722	86,649	3,663	0	43	4,082	87,423	189,133	161,915
1944	301,173	10,057	2,982	40,974	42,507	788	0	0	3,352	109,066	70,903	20,544
1945	380,426	86,455	57,264	32,466	42,438	1,163	0	0	28,634	42,050	88,471	1,485
1946	972,070	384,845	336,128	25,991	29,099	8,580	1,564	12,756	15,941	45,454	104,610	7,102
1947	568,268	145,683	213,861	13,983	24,330	34,268	832	20,537	9,614	4,434	89,571	11,155
1948	1,030,922	327,034	371,429	19,208	13,156	78,030	3,041	32,971	13,348	7,325	150,700	14,670

a/ Data for July 1936 through December 1941 include dutiable imports only as non-dutiable not available by countries by months. For January 1942 to date non-dutiable imports are included because they are not segregated by countries monthly. Non-dutiable imports are less than one per cent of the total in most years. They are admitted free (1) as an act of international courtesy to diplomatic representatives of foreign countries, (2) for supply of vessels for use outside the three mile limit, and (3) as a product of the Philippine Islands.

b/ "Other" includes the following significant gallonage:
French Morocco - 1942, 52, 134; 1943, 91, 849; 1944, 17980
Algeria - 1943, 26, 952; 1946, 2,418;1947, 4,596;1948, 5,328.

c/ Year 1936 covers June 15, 1936 to June 30, 1937.

Source: Compiled by S. W. Shear, Giannini Foundation of Agricultural Economics, University of California, Berkeley, April 1950, directly or indirectly from latest revised monthly reports of the U. S. Dept. Commerce, Bureau Foreign and Domestic Commerce or the Census Bureau; 1935-1948 from compilations of the Wine Institute from Department of Commerce records of revised monthly data by countries.

APPENDIX TABLE 74

UNITED STATES IMPORTS FOR CONSUMPTION OF DESSERT WINE CONTAINING OVER 14% BUT LESS THAN 24% ALCOHOL OTHER THAN VERMOUTH, SAKE AND N.E.S. BY CHIEF COUNTRIES OF ORIGIN, YEARS BEGINNING JULY 1, 1936-1948

Year Beginning July 1	Total[a]	Spain	Madeira and Azores	Portugal	France	Italy	Greece	United Kingdom	Australia	Argentina	Chile	Other
	1	2	3	4	5	6	7	8	9	10	11	12
	Wine Gallons[a]											
Averages:												
1936-1939	897,320	550,304	6,367	130,626	102,628	49,508	11,456	13,669	3,430	719	329	28,284
1940-1942	713,924	494,070	10,146	170,085	19,709	4,760	3,162	423	330	1,012	312	9,915
1943-1945	4,053,667	1,579,239	136,112	2,125,293	8	12,907	45	922	40,448	57,545	866	100,282
1946-1948	942,126	544,077	16,402	299,461	4,295	40,177	7,214	4,555	3,438	6,535	857	15,115
Annual:												
1936[c]	1,023,215	598,558	6,448	118,675	95,980	56,777	15,773	54,676	9,067	2,212	417	64,632
1937	802,640	502,311	4,383	124,544	86,030	52,043	9,502	0	4,555	335	860	18,077
1938	799,113	491,248	6,384	133,096	95,620	43,821	10,363	0	16	254	0	18,311
1939	964,313	609,098	8,253	146,190	132,883	45,391	10,187	0	84	75	38	12,114
1940	705,057	512,536	6,550	120,714	40,857	8,790	5,164	0	793	30	193	9,430
1941	467,921	340,435	5,652	89,662	16,346	4,255	3,480	438	188	487	48	6,930
1942	968,794	629,240	18,235	299,880	1,926	1,235	843	820	10	2,520	698	13,387
1943	7,528,623	2,474,388	306,676	4,440,811	9	0	134	10	59,671	52,569	250	194,105
1944	2,758,535	1,122,653	66,612	1,344,534	0	19,538	0	2,755	39,337	73,466	2,271	87,369
1945	1,873,842	1,140,675	35,048	590,536	15	19,183	0	0	22,337	46,601	76	19,371
1946	1,575,060	918,377	34,111	527,548	4,749	42,878	6,126	1,315	8,864	17,167	0	13,925
1947	664,154	366,414	6,412	216,393	3,552	39,530	5,657	6,234	7	1,746	666	17,543
1948	587,163	347,441	8,683	154,441	4,585	38,122	9,859	6,116	1,442	692	1,904	13,878

[a] Data exclude vermouth, sake and n.e.s. Data for June 1936 through December 1941 include dutiable imports only as non-dutiable not available by countries by months. For January 1942 to date non-dutiable imports are included because they are not segregated by countries in monthly reports. Non-dutiable imports are less than one per cent of the total in most years. They are admitted free (1) as an act of international courtesy to diplomatic representatives of foreign countries (2) for ship supplies of vessels for use outside the three mile limit, and (3) as a product of the Philippine Islands.

[b] "Other" includes the following gallons from Mexico:
1942, 2,850; 1943, 190,522; 1944, 54,690; 1945, 7,643; 1946, 2,992.

[c] Year 1936 covers June 15, 1936 to June 30, 1937.

Source: Compiled by S. W. Shear, Giannini Foundation of Agricultural Economics, University of California, Berkeley, April 1950, from compilation by the Wine Institute from U. S. Dept. Commerce records of final revised monthly imports by countries.

APPENDIX TABLE 75

UNITED STATES IMPORTS FOR CONSUMPTION OF VERMOUTH BY CHIEF COUNTRIES OF ORIGIN YEARS BEGINNING JULY 1, 1935-1948

Year beginning July 1	Total[a]	Chile	Argentina	France	Italy	Spain	Other
	1	2	3	4	5	6	7
	Wine gallons[a]						
Averages:							
1936-1939	1,387,656	6	47	453,456	924,975	2,168	7,004
1940-1942	563,981	206	283,691	108,978	137,907	15,677	17,522
1943-1945	714,207	53,126	559,966	38,549	7,230	24,318	31,018
1946-1948	1,000,495	13,394	190,792	297,435	490,505	1,839	6,530
Annual:							
1935	944,000	-[c]	-	311,000	611,000	-	22,000
1936[b]	1,390,257	0	189	446,553	921,677	6,771	15,067
1937	1,153,912	22	0	366,392	782,701	1,182	3,615
1938	1,227,284	0	0	398,835	824,306	336	3,807
1939	1,779,171	0	0	602,045	1,171,215	385	5,526
1940	766,103	75	251,502	177,406	302,241	26,122	8,757
1941	436,542	146	238,100	81,275	85,651	20,517	10,853
1942	489,298	397	361,472	68,252	25,830	392	32,955
1943	688,892	881	583,840	434	2,018	17,158	84,561
1944	628,081	67,323	551,645	1	301	1,061	7,750
1945	825,650	91,174	544,414	115,212	19,372	54,735	743
1946	1,199,667	29,968	542,972	310,372	307,914	3,520	4,921
1947	765,233	8,186	19,382	254,902	480,891	840	1,032
1948	1,036,585	2,029	10,022	327,032	682,709	1,156	13,637

[a] Data for July 1934 through December 1941 include dutiable imports only as non-dutiable not available by counties by months. For January 1942 to date non-dutiable imports are included because they are not segregated by Countries monthly. Non-dutiable imports are less than one per cent of total imports in most years.

[b] Year 1936 covers June 15, 1936 through June 30, 1937.

[c] Dashes indicate if any included in "Other".

Source: Compiled by S. W. Shear, Giannini Foundation of Agricultural Economics, University of California, Berkeley, April 1950 directly or indirectly from latest revised monthly reports of the U. S. Department of Commerce; 1936-1948 from compilations of the Wine Institute from Department of Commerce records of final monthly revised imports by countries. Data for 1934 involves minor estimate of non-dutiable imports.

APPENDIX TABLE 76

UNITED STATES IMPORTS FOR CONSUMPTION OF SPARKLING WINE BY CHIEF COUNTRIES OF ORIGIN YEARS BEGINNING JULY 1, 1934-1948

Year beginning July 1	Total[a]	Chile	Argentina	France	Italy	Spain	Portugal	Other
	1	2	3	4	5	6	7	8
	Wine gallons[a]							
Averages:								
1936-1939	563,656	121	155	540,398	13,160	487	8	9,327
1940-1942	150,222	1,891	13,493	128,389	2,884	260	1,051	2,254
1943-1945	165,012	10,269	29,306	102,802	1,622	7,088	11,130	2,795
1946-1948	348,660	5,153	4,560	306,992	24,179	1,388	4,984	1,404
Annual:								
1934	285,589	0	0	221,467	6,512	0	0	0
1935	278,638	0	0	237,116	4,775	0	0	0
1936	564,783	30	292	521,564	15,960	977	8	25,952[b]
1937	538,749	73	66	522,104	13,344	362	20	2,780
1938	509,936	185	199	493,225	12,454	383	5	3,485
1939	641,154	196	57	624,701	10,884	224	0	5,092
1940	254,216	909	10,308	232,814	6,784	223	1,577	1,601
1941	88,854	2,532	12,995	69,023	984	259	847	2,214
1942	107,595	2,231	17,176	83,330	883	298	730	2,947
1943	89,818	6,131	36,282	11,953	0	9,234	19,812	6,406
1944	65,209	10,914	31,676	6,650	0	8,385	6,572	1,012
1945	340,007	13,762	19,959	289,802	4,865	3,645	7,006	968
1946	401,817	7,942	9,195	350,756	29,663	2,889	1,147	225
1947	233,823	2,522	3,249	204,258	18,674	727	3,811	582
1948	410,340	4,995	1,236	365,963	24,200	548	9,992	3,406

[a] Data for July 1934 through December 1941 include dutiable imports only as non-dutiable not given by countries monthly. For January 1942 to date non-dutiable imports are included because they are not segregated by countries monthly. Non-dutiable imports are less than one per cent of total imports in most years. They are admitted free (1) as an act of international courtesy to diplomatic representatives of foreign countries (2) for supply of vessels for use outside the three mile limit, and (3) as a product of the Philippine Islands.

[b] Of "other" United Kingdom supplied 12,718 gallons in 1936.

Source: Compiled by S. W. Shear, Giannini Foundation of Agricultural Economics, University of California, Berkeley, April 1950 directly or indirectly from latest revised monthly reports of the U. S. Department of Commerce: 1933-1935 from monthly mimeographed releases, Imports of Distilled Liquors, Wines and Cordials, by Countries; 1936-1948 from compilations of the Wine Institute from Department of Commerce records of final revised monthly imports by countries.

APPENDIX TABLE 77

SPARKLING WINE: PRODUCTION AND WITHDRAWALS FOR CONSUMPTION, DOMESTIC AND IMPORTED. UNITED STATES AND CALIFORNIA, YEARS BEGINNING JULY 1, 1933-1949

Years beginning July 1	Stocks, U. S. July 1	Production, net		Withdrawals for consumption in United States				
						Domestic wine, tax paid[a]		
		United States	California	Total (5+6)	Imports tax paid and free	Total[b]	Natural sparkling[c]	California wine[b]
	1	2	3	4	5	6	7	8
	thousands of gallons (000 omitted)							
Averages:								
1933-1935	321	392	99	587	308	279	--[d]	67
1936-1940	618	512	117	948	505	443	420[d]	92
1941-1944	916	1,275	414	1,236	88	1,148	1,088	350
1945-1948	1,539	1,546	524	1,718	358	1,360	1,331	427
Annual:								
1933		476	108	636	352	284	--[d]	88
1934	451	269	67	553	289	264	--	63
1935	464	361	120	572	282	290	--	51
1936	539	442	67	963	568	395	--	59
1937	582	446	71	904	543	361	--	65
1938	662	304	95	831	514	317	260	73
1939	647	435	106	1,063	644	419	345	88
1940	660	867	226	981	258	723	655	174
1941	794	1,161	321	968	90	878	827	217
1942	1,050	946	282	1,212	108	1,104	1,048	306
1943	882	1,417	539	1,438	90	1,348	1,255	474
1944	936	1,477	480	1,328	65	1,263	1,222	405
1945	1,132	1,925	653	2,172	386	1,786	1,749	592
1946	1,225	2,324	916	1,951	402	1,549	1,518	523
1947	1,975	909	169	1,255	234	1,021	999	261
1948	1,823	1,028	358	1,493	410	1,083	1,059	331
1949	1,743							

[a] Tax paid Champagne, other natural sparkling wine, and artifically carbonated wine, converted at 20 taxable units per gallon.

[b] Reported U. S. "withdrawals" and "disappearance" of sparkling wine 1934-1946 averaged practically the same but California withdrawals totaled 255,000 gallons less than disappearance, an average of nearly 20,000 gallons a year.

[c] Champagne and other natural sparkling wines. Artificially carbonated is the small difference between Cols. 6 and 7.

[d] Dashes indicate no segregation reported before 1938, so average 1936-1940 is for years 1938-1940 only.

Source: Compiled by S. W. Shear, Giannini Foundation of Agricultural Economics, University of California, Berkeley, March 1950 from official reports of the Bureau of Internal Revenue, U. S. Treasury Department except imports for consumption, duty paid and tax free, from official reports of the U. S. Department of Commerce.

APPENDIX TABLE 78

CALIFORNIA FRUIT BRANDY, NEUTRAL AND BEVERAGE, SUPPLY AND DISAPPEARANCE, YEARS BEGINNING JULY 1, 1909-1913 AND 1933-1949

Year Beginning July 1	Total, Beverage and Neutral				Neutral for Fortifying Dessert Wine				Beverage Brandy		
	Stocks July 1 a/	Production Gross b/	Supply Gross	Disappearance Gross c/	Disappearance			Production Gross	Disappearance c/ d/	Production	
					Total	Used in California	Used in Other States			Gross e/	Fresh Fruit Used
	1	2	3 (1 - 2)	4	5 (6 + 7)	6	7	8	9 (4 - 5)	10	11
	Thousands of Proof Gallons (Substantially Same As Tax Gallons)										Tons
Averages:											
1909-1913	2,510	7,489	9,999	7,434		5,024	-	5,024	2,410	2,465	62,000
1935-1939	6,111	19,392	25,504	16,764	15,251	14,937	314	16,278	1,514	3,114	78,000
1940-1944	11,997	22,777	34,774	24,366	20,232	19,100	363	18,835	4,875	3,942	98,400
1945-1948	9,146	34,318	43,464	34,218	30,679	30,462	217	30,776	3,539	3,512	90,500
Annual:											
1933-34	1,209	7,035	8,244	5,891	4,690	4,600	90	4,711	1,201	2,324	58,000
1934-35	2,353	9,292	11,645	8,907	7,345	7,200	145	7,992	1,562	1,300	32,000
1935-36	2,738	19,233	21,971	18,239	16,625	16,300	325	17,545	1,614	1,688	42,000
1936-37	3,732	11,945	15,677	12,692	10,943	10,732	211	10,506	1,749	1,439	36,000
1937-38	2,985	21,234	24,219	20,083	18,608	18,242	366	18,716	1,475	2,518	63,000
1938-39	4,136	26,867	31,003	14,037	12,629	12,353	276	18,084	1,408	8,783	220,000
1939-40	16,966	17,683	34,649	18,771	17,448	17,056	392	16,540	1,323	1,143	29,000
1940-41	15,878	24,754	40,632	27,042	24,715	24,228	487	22,451	2,327	2,303	58,000
1941-42	13,590	28,350	41,940	28,119	24,776	24,394	382	24,816	3,343	3,534	88,000
1942-43	13,821	15,465	29,286	20,175	13,144	12,826	318	11,371	7,031	4,094	102,000
1943-44	9,111	20,733	29,844	22,259	15,292	15,026	266	15,920	6,967	4,813	120,000
1944-45	7,585	24,584	32,169	24,235		19,028		19,617	4,705	4,967	124,000
1945-46	7,934	33,145	41,079	32,229	26,542	26,327	215	28,104	5,737	5,041	126,000
1946-47	8,800	43,276	52,076	42,166	38,509	38,281	228	37,552	3,657	5,724	143,000
1947-48	9,910	25,091	35,001	25,060	23,399	23,227	172	23,884	1,661	1,207	30,000
1948-49	9,941	35,760	45,701	37,366	34,265	34,013	252	23,566	3,101	2,194	55,000
1949-50	8,335	20,829	29,164							1,200	30,000

a/ Stocks in California special and bonded warehouses before 1933 but inbonded only since then.

b/ About 99 per cent of California brandy is made from grapes.

c/ Gross disappearance is considerably greater than U.S. consumption of California beverage brandy.

d/ Withdrawals from bonded warehouses in other states assumed as made in California.

e/ Gross production estimates of 1949 for 6 months only, July 1-December 31, from Wine Institute 14th Annual Wine Industry Statistical Survey Part I, March 7, 1950.

Source: Compiled by S. W. Shear, Giannini Foundation, March 1950, from annual reports of U. S. Commissioner of Internal Revenue except 1949 production, see footnote e/. Segregation of beverage and neutral brandy estimated.

APPENDIX TABLE 79

CALIFORNIA RAISINS USED IN MAKING BRANDY AND SPIRITS IN THE UNITED STATES

Years beginning July 1 (July 1-June 30)	Total	Reported as used at[a]	
		Distilleries	Wineries[b]
	1	2	3
	Dry tons		
1935-36	-[c]	4,920	-[c]
1936-37	-	8,904	-
1937-38	-	3,848	-
1938-39	4,148	1,489	2,659
1939-40	21,377	4,829	16,548
1940-41	10,533	3,529	7,004
1941-42	6,332	2,739	3,593
1942-43	10,571	2,844	7,727
1943-44	17,452	5,114	12,338
1944-45	29,930	8,901	21,029
1945-46	33,226	10,004	23,222
1946-47	14,007	5,576	8,431
1947-48	11,007	6,358	4,649
1948-49	6,803	6,075	728

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[a] All or very nearly all the California raisin tonnage reported was used by California distilleries and wineries and very little or none in other states.

[b] Raisins used by wineries are presumably for distilling material for making brandy and neutral spirits mostly finally used for fortifying dessert wine.

[c] Dashes indicate no data given in Annual Reports.

Source: Compiled by S. W. Shear, Giannini Foundation of Agricultural Economics, March 1950, from Annual Reports of the Commissioner of Internal Revenue of U. S. Treasury Dept.

APPENDIX TABLE 80

UNITED STATES BRANDY IMPORTS FOR CONSUMPTION BY CHIEF COUNTRIES OF ORIGIN YEARS BEGINNING JULY 1, 1934-1948

Year Beginning July 1	Total[a]	France	Spain	Portugal	Union South Africa	Argentina	Chile	Greece	Other
	1	2	3	4	5	6	7	8	9
	Proof Gallons[a]								
Averages:									
1936-1939	769,567	818,000	22,607	138	484	0	38	16,120	13,180
1940-1942	452,023	182,281	72,556	160,420	28,119	1,165	5	2,501	4,976
1943-1945	2,460,379	165,049	810,117	1,354,873	51,906	11,408	14,110	44	32,872
1946-1948	629,091	389,578	80,978	125,373	15,044	847	3,994	1,520	11,757
Annual:									
1934	457,468	394,366	14,015	- [b]	-	-	-	-	49,087
1935	462,104	415,076	15,671	-	-	-	-	-	31,357
1936	793,608	708,185	28,870	274	5	0	24	31,391	24,859
1937	701,236	637,299	28,624	122	229	0	0	23,291	11,571
1938	700,253	666,944	13,750	85	1,251	0	120	6,625	11,478
1939	883,173	855,572	19,085	71	452	0	7	3,173	4,813
1940	503,553	375,941	85,823	20,024	14,040	256	2	3,152	4,315
1941	261,817	80,530	57,206	88,349	31,151	379	14	1,459	2,729
1942	590,701	90,371	74,640	372,888	29,165	2,860	0	2,893	7,884
1943	3,852,583	4,977	1,263,716	2,445,861	51,078	22,375	4	132	64,440
1944	2,324,120	16,573	835,847	1,332,828	70,816	10,193	30,661	-	27,202
1945	1,204,436	533,597	330,787	285,930	33,825	1,656	11,666	-	6,975
1946	958,398	538,378	150,703	232,293	27,958	1,247	2,936	1,378	3,505
1947	381,222	245,288	39,266	75,927	9,030	915	516	1,124	9,156
1948	547,653	385,067	52,966	67,900	8,144	379	8,530	2,057	22,610

[a] Data include dutiable and non-dutiable imports. January 1942 to date non-dutiable imports are not segregated by countries monthly. Non-dutiable imports are less than one per cent of total imports in most years. They are admitted free (1) as an act of international courtesy to diplomatic representatives of foreign countries (2) for ship's supplies of vessels for use outside the three-mile limit and (3) as a product of the Philippine Islands.

[b] Dashes indicated if any included in "other".

Source: Compiled by S. W. Shear, Giannini Foundation of Agricultural Economics, University of California, April 1950, directly or indirectly from latest revised monthly reports of the U. S. Dept. Commerce: 1933-1935 from monthly mimeographed releases, Imports of Distilled Liquors, Wines and Cordials, by Countries; 1936-1948, from compilations of the Wine Institute from Dept. of Commerce records of final revised monthly imports by countries.

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Economic Situation and Market Organization in the California Grape Industries

by

George L. Mehren

Appendix D

Market Control

Part Number	Subject Matter	Pages
1 to 5	California Legislation and Programs	1d
6	Federal Price Support	8d
7 to 10	Price Control	9d
11 to 13	Federal Legislation and Programs	12d
14 to 15	Federal Subsidy	15d

May, 1950

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Mimeographed Report No. 107

Appendix D. Part 1.
California Marketing Act of 1937

1300.10 Legislative policy: (a) Unreasonable, unnecessary economic waste as a result of marketing amounts exceeding reasonable and normal demands; disorderly marketing; improper preparation; lack of uniform grading or classing; unfair methods of competition; inability to hold or to develop or expand markets--all jeopardize continued production and prevent fair farm return. Farm purchasing power has been and again may be relatively low. Farm people therefore have low living standards and thus increase tax burdens on others. (b) Therefore the state aids in preventing waste, to develop more efficient and equitable methods and to restore purchasing power. (c) Farm marketing is affected with the public interest and this is a police power act.

1300.11 Purposes: (a) Correlate marketing with demand; (b) establish orderly marketing; (c) uniform grading, proper preparation; (d) hold markets, expand or develop markets and prevent, modify or eliminate trade barriers; (e) eliminate or reduce economic waste.

1300.12 Definitions: Agricultural Commodity, any and all agricultural, horticultural, viticultural (including wine) and vegetable products in natural state or as processed including bees and honey but not timber or timber products. Processor, changing form to prepare for market, marketing or associated activities but not manufacturing another product from an agricultural processed product. Distributor (does not include retailer handling already regulated product); Retailer, may also be distributor; Advertising and sales promotion, usual meanings plus trade promotion; prevention, removal or modification of trade barriers, including negotiations with and presentation of facts to state, federal or foreign governments. Wine has always been specifically considered an agricultural commodity since the Act was passed.

1300.13 (a) Orders administered by Director. (b) Director on own or at instance of others may hold public hearings prerequisite to issuance of order. (c) Notice of hearings is specified for all producers and handlers or others affected, setting forth: date and place of hearing; commodity and area to be covered; testimony and evidence to be received. Public testimony under oath. Verbatim record. Handlers may be required after notice to give information on name, address, amount handled, names and addresses of producers who may be affected and quantities handled therefor. The Director may proceed on the basis of available replies. Lists compiled are conclusive. Information shall not be made available for private purposes.

Director may enter agreements which bind signers with processors, distributors, producers and others engaged in handling. Requirement to prepare lists is not binding. Written request for termination provisions are not applicable to agreements.

1300.14 Standards: (a) Before issuing for assent an order correlating supply to demand by restricting the quantity of any or all grades, sizes, qualities or conditions, Director must find proposed regulations: (1) necessary to correlate supply-demand, maintain or re-establish prices such as to keep production high enough to meet normal needs; (2) will approach equality of purchasing power at rate as rapid as feasible; (3) be within law and will contribute towards its declared purposes; (4) protect consumers by limitation to extent necessary for declared purposes only. (b) In making findings the Director must consider when relevant: available supply; normal consumption; cost of production; purchasing power; prices of competing goods; prices of goods bought by farmers. (c) If only rate of flow; grade size or condition; uniform grading and inspection; elimination of unfair practices; trade promotion or advertising; or research--Director need only find that provisions are reasonably calculated to attain goals of order; in conformity to Act; consumers protected by limitation of use to degree necessary; (d) Must make findings in (c) on basis of hearing record, official data or information from institutions of recognized standing.

1300.15 (a) Advisory Board mandatory--Producers only are members if order affects producers only; handlers only are members if order affects handlers only; both if groups are affected. Number set by Director. On recommendation of Board, Director may appoint one member to represent the public or the Department of Agriculture. Boards get expenses only. May: enter contracts or agreements; employ personnel, including attorneys in private practice, fix pay and terms of employment; incur expenses as approved by the Director. Duties: administer order with approval of Director; recommend rules and regulations; receive and submit complaints of violations; recommend amendments; assist in assessment and collection; assist in collection of data. (b) Permitted terms of orders: (1) Surplus. Determine extent by grade, size or quality. Provide for control, disposition and equalization of burden. Among other methods, may use stabilization funds for diversion except for hermetically sealed products. May assess producers or handlers or both therefor. (2) Limitation on quantity to be marketed or processed or handled by grade, size or quality by uniform rule. (3) Allotment by grade, size or quality of amounts acquired from producers by handlers according to past performance, current control or both. (4) Allotment of amounts handled by grade, size or quality by past performance, current control or both bases. (5) Defining the period or periods during which products may be handled. (6) Establish surplus, stabilization or by-products pools; sell, distribute net returns; handle by grade, size, quality or condition if desired; cannot sell contents of pool in competitive channels; may go to relief or charity. May sell in regular channels consistent with stable market. By-products pools may go only into by-products outlets. Boards may arrange and operate storing financing, grading, packing, servicing, processing, preparing for market, selling, disposing of contents but may not engage in commercial warehousing. Board holds content of pool. May pledge for loans. May assess producers to raise equalization fund. (7) May establish grading and inspection service; may set standards of quality, condition, size or pack but not below current minimum standards set out in law. (8) Advertising; sales promotion; prevention, removal or modification of trade barriers; plans may not refer to brand or trade names, make unwarranted claims or disparage other agricultural products. (9) Prohibition of any trade practices found unfair and detrimental after hearings. (10) Production adjustment payments from funds collected from all commercial growers of the product within the state, supplemented if desired and possible by funds received from federal, state or other agencies for this purpose. No tree or vine pulling if acreage yield higher than state average in three preceding years. (11) Research in production, processing or distribution.

1300.16 Formulation and effectuation: (a) (1) Assent of handlers of 65 per cent volume or 65 per cent by number except in canning fresh fruits or vegetables or canning or packing dried fruits, in which case order or amendment must be approved by 65 per cent number and volume. (2) Orders or amendments directly affecting producers or producer marketing require: (A) 65 per cent of producers with 51 per cent of volume; or (B) 65 per cent of volume by 51 per cent of producers; or (C) 51 per cent by number in referendum and volume in preceding season. Director may choose between assents and referendum in determining approval. Referendum period is 60 days. Method (C) applies to percentage casting votes in referendum. May extend period up to 30 days. (3) Assent of cooperative is assent of producer-members. (4) Hearing record is basis of finding on time necessary to receive assents and choice between referendum or assents if producers are directly affected. (b) Subject to above limitations, the Director may issue orders regulating producer marketing, processing, distributing or handling of any commodities in any manner by any persons. (c) May terminate at end of current season if after hearing, Director finds order is not consistent with declared policy and on written request of 40 per cent of producers and handlers by number and volume if announced prior to date specified in order. (d) Substantive amendments require full procedure. "Minor amendments" clarifying meaning only may be effectuated by the Director. (e) Notice is required for effectuation, suspension, amendment or termination. (f) On recommendation of Board, the Director may formulate rules and regulations.

1300.17 Expenses: (a) Uniform assessments may be levied on all persons directly regulated, not exceeding $2\frac{1}{2}$ per cent gross dollar sales by producers nor $2\frac{1}{2}$ per cent gross dollar purchases by handlers or processors. Producers only are assessed if order regulates producers only; handlers only; or both if both are regulated. Advance assessments and postseason adjustments are provided. (b) Additional trade promotion assessments may not exceed 4 per cent of gross dollar volume of sales. Commodities may be assessed in both unfinished, and processed form but no one need pay more than one assessment. Advance assessments up to 25 per cent may be levied. Postseason adjustments are provided. (c) A combined assessment may be levied up to $6\frac{1}{2}$ per cent of dollar volume, with proportions going to administration and advertising set by the Boards. (d) Moneys are deposited in banks. Annual audits. Unused funds may be prorated back to contributors or credited prorata to their accounts for next year. Small remainders may be used to cover cost of subsequent programs for the same commodity. Otherwise to State Treasury.

1300.18 May limit areas of applicability if all persons of like class are covered.

1300.19 Violations: (a) Misdemeanor, \$50. to \$500. fine; imprisonment 10 days to six months. Each day a separate offense. (b) Civil liability up to \$500. for each suit deposited to account of program. (c) Violations may be referred to Attorney-General or Director may call administrative hearing. Director may dismiss complaint or refer to Attorney-General or issue cease and desist order. Attorney-General may bring action for criminal or civil offense or for injunction. Courts may issue temporary restraining order and preliminary injunction and permanent injunction after trial. If suit resolved in favor of state, defendant may bear costs. Misdemeanors: false or fraudulent reports; information on names of sellers and volumes handled. Penalties are concurrent and alternative and cumulative with all other penalties. Statute of limitation, two years.

1300.20 Assessments are personal debts. Up to 10 per cent may be added for collection of expense.

1300.21 Board members are liable only for own acts of crime or dishonesty.

1300.22 Books and records may be required. Information is confidential.

1300.23 Preliminary deposits may be required of applicants for order with reimbursement if effectuated.

1300.24 Parallel orders and committees to federal programs are authorized, responsible to Director for intrastate activities. May confer with other states or federal officials for uniformity, issue joint orders, joint hearings. Defense

1300.25 Retailers are exempted except insofar as engaged in processing or distributing.

Appendix D. Part 2.
Marketing Order for Wine

I. "Act": California Marketing Act of 1937. "Area": State of California. "Processor": person engaged in U.S. bonded winery, storeroom or field warehouse for commercial purposes in receiving, grading, fermenting, distilling, preserving, grinding, crushing, or changing grapes into wine for market, or in receiving, storing, aging, or treating wine or in preparing wine for market. "Wine": product of fermenting grape must, on U.S. bonded premises, with or without addition or abstractions, including wine as defined in Chapter 26, Subchapter B, Section 3044 of Internal Revenue Code and regulations thereunder and in laws of California and includes Champagne, sparkling wine, carbonated wine, vermouth, aperitif wines if containing not less than ½ per cent or more than 24 per cent alcohol by volume. "Dessert wine": contains over 14 per cent alcohol by volume. "Table wine": 14 per cent or less alcohol by volume. "Processing": producing wine; crushing grapes for wine; making must or pure boiled or condensed must from grapes for wine; fermenting grape must into wine; fortifying or blending wines; blending, filtering, clarifying, cellar treatment, aging, storing or warehousing; receiving wine for further distilling, blending, filtering, clarifying, cellar treatment or repacking; for aging, storing or warehousing. "Preparation for market": placing wine in movable containers except for transfer to other U.S. bonded premises in California solely for further or additional processing. "Marketing season": July 1 - June 30.

II. Wine Advisory Board: 19 processors. No more than three vacancies permitted. Majority is quorum. In addition to standard powers and duties: assist in assessment and collection and administration of funds; assist in collection of necessary information and data; cooperate with and coordinate activities with other California grape programs. Advertising Subcommittee of seven members to assist the Board and the Director in administering advertising and sales promotion program.

III. Advertising, Sales Promotion, Research: Establish plans for advertising and sales promotion to maintain, expand or create markets and for research in distribution. May include: advertising; dealer service; trade promotion; publicity; market development and expansion; prevention, modification or removal of trade barriers, including negotiations with state, federal or foreign officials; research studies of methods of wine distribution--provided that advertising makes no reference to brand or trade name and makes no false or unwarranted claims or disparages any other agricultural commodity. Advertising Subcommittee submits plans for approval by Board and submission to Director. Funds are disbursed in conformity thereto.

IV. Assessments: One and one-half cents per gallon on dessert wine and three quarters of one cent per gallon on table wine at times set by Director. Rates must be reduced if fund exceeds or is about to exceed maximum percentage of gross dollar volume of sales by all processors authorized by the Act. Proportion allocated to administrative purposes may not exceed percentage authorized by Act.

V. Effective through June 30, 1951 unless sooner terminated. Effective June 25, 1948.

Rules and Regulations

1. Monthly statements of wine prepared for market by each processor.

2. Itemized account of assessments due monthly payable upon sale or removal of wine.

Appendix D. Part 3
Marketing Order for Raisin Processors
Effective June 28, 1949

I. "Raisins" -- grapes of Thompson Seedless, Muscat and Sultana varieties, currants of the Zante variety or other varieties of grapes or raisins from which "a part of the natural moisture has been removed either by sun-drying or artificial dehydration, including bleached raisins. "Processor" -- any person engaged within the State of California in "receiving, stemming, grading, sorting, cleaning, seeding, packing or otherwise preparing raisins for marketing in any form."

II. Advisory Board, seven processor members, one from a cooperative handling at least ten per cent of total volume, to administer order, recommend rules and regulations, receive complaints of violations, recommend amendments, assist in the collection of funds and of information, keep records and appoint employees.

III. Prepare and administer, subject to approval by the Director, plans and programs to expand sales, maintain existing markets and create new markets without reference to brands, without disparagement of other farm products and without unwarranted claims. The Board may investigate possibilities for increasing demand, assembling or disseminating market information or educational information designed to improve quality, present facts or negotiate with governmental agencies and may contract with qualified persons for the performance of these functions.

IV. With the approval of the Director, the Board may conduct or arrange for research in marketing, production or processing of raisins.

V. Combined administrative and promotional assessments may be levied but not in excess of $1.00 per ton on all natural condition raisins received by processors or equivalent if other basis is used and proportion for advertising may not exceed limit set at law.

Appendix D. Part 4.
Marketing Order for Wine Processors

I. Definitions: "Processor" -- commercial, U.S. Bonded winery, U.S. Bonded Storeroom, U. S. Bonded field warehouse -- receiving, grading, fermenting, distilling, preserving, grinding, crushing or changing the form of grapes into wine or in some status, receiving, grading, storing, aging or treating of wine. "Wine"-- product of fermentation of grape must on U.S. Bonded wine premises, with or without addition or abstraction as defined in Ch. 26, Sub Ch. B, Sec. 3044, Internal Revenue Code and in laws of California containing not less than ½ per cent or not more than 24 per cent alcohol by volume. "Dessert wine" -- alcohol content in excess of 14 per cent. "Table wine" -- 14 per cent or less alcohol. "Processing material wine" -- as defined in Sec. 178.174, Regulations 7, U.S.B.I.R, used solely in rectification of distilled spirits. "Processing" -- producing wines; crushing grapes for wine; making must or pure boiled or concentrated grape must for wine; fermenting must into wine; fortifying or blending wines; blending, filtering, clarifying, cellar treatment, aging, storing or warehousing; receiving wine for further distilling, blending, filtering, clarifying, cellar treatment, repackaging; receiving wine for aging, storing or warehousing; preparation for market. "Preparation for market" -- placing wine in moveable containers or removal of wine from premises above defined -- except for transfer to subsidiary or affiliate for further distilling, blending, filtering, cellar treatment or repackaging; except same for purposes of aging, storing or warehousing; except processing material wine solely for transfer or removal, except for free inventory and acquired inventory. "Free inventory" -- gallons in inventory on June 30. "Acquired inventory" -- acquired and moved into premises between July 1 and March 1 from free inventory only of other processors. "Reserve inventory" -- wine gallons of inventory other than free or acquired inventory physically possessed as between July 1 and March 1.

II. Wine Marketing Advisory Board: 17 processor-members. Duties and powers: administer; recommend rules and regulations; report violation complaints; recommend amendments; assist in assessment and collection of funds; collect data; keep records; cooperate with other grape boards.

Dessert wine Subcommittee: 5 dessert wine processors; formulate marketing policy for dessert wines in ensuing season by July 20; recommend total quantity in percentages of dessert wine based on inventories of processors during season or any part. Must submit supporting data.

Table wine Subcommittee: 5 table wine processors. Formulate and recommend marketing policy by July 20. Recommend total quantity to be prepared for market by all processors on basis of inventories. Submit supporting data.

III. Marketing Policy 1949-1950: Any processor may prepare for market between July 1, 1949 and March 1, 1950 dessert or table wines equal to 100 per cent free and acquired inventory. No reserve inventory shall be prepared for market before March 1, 1950. Inventory statements must be sworn by July 10, 1949 as of June 30, 1949.

Marketing Policy, Subsequent Seasons: Every processor must file sworn inventory as of June 30 by July 10. After considering recommendations of Dessert and Table Subcommittees, the Advisory Board must set out proposed policy by July 25, including total quantity in percentage of free inventory to be prepared for market from July 1 through following February. Recommendations of less than 90 per cent or more than 100 per cent of free inventory require concurrence of three fourths of the members of the committee. The same approval is required for 80 per cent or less of free inventory recommendation and at least 65 per cent of processors casting ballots within 15 days of dispatch thereof must approve such recommendation. Standards: quantities available for preparation for market; free inventory as of July 1; normal market requirements; purchasing power; competing goods prices; prices paid; estimated crush based on total production estimated and estimated sales fresh, raisins, brandy or other products.

Director shall fix quantities to be prepared for market by all processors if necessary to correlate supply and demand and if it will not result in less than sufficient wine being prepared to meet reasonable demands. Regulations must be under uniform rules and be set out prior to August 5. If ballot is necessary, determination must be made by August 20. Immediate notice must be given by the Director to the Board and thence to individual processors of amounts authorized for preparation.

Policy must be reviewed between November 15 and 30. Increase in percentage only may be recommended on three-fourths vote of Board up to November 30. The Director may effectuate this increase up to December 10. Processors may prepare for market the permitted amount of wine plus acquired inventories only.

Operating Rules and Regulations

Duties: (1) Determine amounts which may be prepared by a processor between

July and February, (2) Obtain necessary reports, (3) Recommend percentages of free inventory which may be prepared for market.

Commercial records: Must be kept available for three years.

Inventory Reports: As of June 30.

Wine Movements: Not later than 20th of next following month, by table, dessert, free, acquired and reserve; (1) Inventory on first of month, (2) Wine produced, (3) Free inventory received and sources thereof, (4) Reserve inventory received for aging, storing or warehousing and sources thereof, (5) Other additions to inventory, (6) Wine prepared for market, (7) Other transfers or removals, (8) Adjustment of inventory, (9) Inventory on last of month.

Records: (1) Transfer of free inventory, (2) Receipt of free inventory, (3) Transfer and/or receipt of reserve inventory, (4) Wine returned for reconditioning, return to bond, out-of-state wine added to inventory, (5) Quantities used in processing material wine, (6) Transfers for distilling, blending, filtering, cellar treatment or repackaging.

Appendix D. Part 5.
Marketing Order for Grape Stabilization

Effective September 16, 1949.

I. Definitions: "Grapes" -- fresh or processed received by processors for processing and products obtained therefrom: "dessert wine" -- over 14 per cent alcohol by volume; "table wine" -- 14 per cent or less; "brandy and high-proof" -- distilled wine, products or residues of grapes containing over 24 per cent alcohol by volume; "processing material wine" -- used solely in rectification of distilled spirits. "Grape Concentrate" -- dehydrated or partially dehydrated must except as used in nonalcoholic products.

II. Advisory Board: 19 processors; maximum of three vacancies; majority is quorum. Growers Advisory Subcommittee: 35 producers, nominated at public hearing and with reference to districts, varieties, volumes and types of organizations.

III. Surplus Diversion Pool and Facilities: (A) Board shall investigate or cause to be investigated economic and marketing conditions and determine the size of surplus of grapes and grape products by varietal class and utilization, considering at least: (a) available or to be available supplies of table, wine and raisin varieties; (b) inventories of wine, brandy, high-proof, grape concentrate, other products and by-products; (c) raisins; (d) current and prospective consumer and market demands for products in (b) and (c); (e) quantities by varieties needed by utilization; (f) current and prospective prices by utilizations; (g) existing or prospective orders, programs, laws, funds, financing or other factors which might affect the supply, disposition or diversion of grapes or grape products or by-products. Must consult with Growers' Advisory Subcommittee. Submit report to Director. On basis thereof may recommend, by variety, quantity of grapes or products or the percentage in surplus which should be bought for diversion with stabilization money. Board by two-thirds vote of full membership may recommend diversion pool if funds are adequate. (B) Director may approve reports and recommendations if he finds them reasonable and tending to effectuate declared policy. (C) On recommendation and approval, Board shall establish a surplus diversion pool for receiving, handling and disposal of grapes or grape products. (D) With approval by Director, Board may dispose of pooled supplies in channels not directly competitive at times and in manner as Board finds consistent with maintaining stabilized marketing conditions. (E) Surplus diversion pool expenses borne by available administrative funds and pool proceeds. Net proceeds may be credited with approval of Board and Director to pool revolving fund to be used in same way as stabilization funds or be refunded prorata.

IV. Research and survey studies in production, processing or distribution of grapes or products, including causes of surplus, elimination thereof, procedures for stabilization in whole industry or segments, may be financed by Board.

V. Assessments. (A) For acquiring grapes or products and for diversion, Board may recommend assessments not greater per gallon than $.06, brandy and high-proof; $.03, dessert wine; $.01, table wine. Paid as directed by Director over time recommended by Board. (B) Administrative and research assessments, not greater than one fifth of $.01, brandy, high-proof and grape concentrate; one tenth of $.01 on dessert wine; one thirtieth of $.01 on table wine. (C) Advance assessments up to 25 per cent of maxima are authorized. (D) Funds may be augmented through federal or other agencies and stabilization funds grapes or products in pools or obligations to pay into the pool or into stabilization funds may be hypothecated therefor.

Rate of Assessment for Administration and Research for Grape Stabilization: Per gallon: one tenth (1/10) of one (1) cent, dessert wine; one thirtieth (1/30) of one (1) cent per gallon, table wine; one fifth (1/5) of one (1) cent per proof gallon on brandy, high-proof and grape concentrate. September 16, 1949 through June 30, 1950.

Advance Administration and Research Assessment Deposit: Twenty-five per cent (25%) of total assessment rate of 1/120 of $.01 or $.0000825 on table wine, 1/40 of $.01 or $.00025 on dessert wine, 1/20 of $.01 or $.0005 on grape concentrate and 1/20 of $.01 or $.0005 per proof gallon on brandy and high-proof. Per gallon on amount prepared for market between September 16, 1949 and June 30, 1950.

Operating Rules and Regulations Effective October 1, 1949: Order under California Marketing Act of 1937. Effective September 16, 1949. Principal purposes: (1) Research and survey studies; (2) investigate and cause to be investigated economic conditions affecting the industry and to determine the surplus by variety and utilization; (3) consult with Growers' Advisory Committee before making recommendations; (4) recommend surplus diversion pool as provided in order; (5) recommend diversion purchases of grapes or products by amount or percentage; (6) arrange for or operate necessary storing, financing, grading, servicing, processing, preparing for market, selling or disposing of diversion pool, holding title to contents of pool; (7) administer stabilization fund and recommend disposition of net proceeds.

Assessments for Stabilization Fund: Effective when recommended by Board and approved by Director, dates for beginning and termination of assessments for stabilization fund and for establishment of surplus diversion pool. Rates at six cents, grape concentrate, brandy and high-proof (proof gallon): three cents on dessert wine; one cent on table wine.

Appendix D. Part 6.
Federal Funds for Diversion

Section 32, Agricultural Adjustment Act of 1935, as amended: Amount appropriated each fiscal year equal to 30 per cent of gross customs receipts in preceding calendar year, kept in separate fund and used by the Secretary of Agriculture only to: (1) encourage exports through benefit or indemnity payments on export losses or by payments to producers on part of production required domestically; (2) diverting from normal channels by benefits or indemnity payments, donations or other means to increase utilization among low-income consumers; and (3) making production payments in connection with normal production for domestic consumption. Not more than 25 per cent of the funds available in any fiscal year may be used for any one commodity or its products. Funds are administered by the Secretary. Funds may cumulate over fiscal years up to $300,000,000. Funds shall be used mainly for perishable nonbasic commodities not listed in title II of the Agricultural Act of 1948.

Appendix D. Part 7.
Resale Price Maintenance
Part 2, Division 7, Business and Professions Code--Stats. 1941, Ch. 526

Ch. 3. Fair Trade Contracts. 16901. a. Producer is grower, baker, maker, manufacturer or publisher. b. Commodity--any subject of commerce. 16902. a. No contract relevant to sale or resale of commodity branded or in branded container is void or illegal for reason of: (1) resale price stipulation; (2) requirements for agreement for resale price maintenance by buyer. b. Exceptions: closeout, deteriorated, court order sales. 16903. Applicable to products sold through vending machines if bear producer's or owner's brand. 16904. Advertising, offering or selling at price other than stipulated in contract is actionable as unfair competition. 16905. Not applicable to contracts between producers or between wholesalers, or between retailers.

Appendix D. Part 8
Loss Leaders
Part 2, Division 7, Business and Professions Code--Stats.1941, Ch. 526.
Ch. 4 Unfair Trade Practices

17001. To protect against monopolies and to encourage competition by prohibiting unfair, dishonest, deceptive, or destructive competition. 17021. Person: person, firm, association, organization, partnership, business trust, company, corporation, municipal or other corporation. 17022. Sell includes to sell, offer or advertise for sale. 17023. Give includes to give, offer or advertise intent to give. 17024. Article or product: article, product, commodity, thing of value, service or output of a service trade. Exceptions: motion picture films licensed for exhibition; products with rates set by Public Utilities Commission and products connected therewith; products of public utilities and products connected therewith on which rates would have been set by the Public Utilities Commission if sold. 17025. Vendor: works on, renovates, alters, improves personal property of another person. 17026. Cost of production: includes raw materials, labor and all overhead expense. Cost of distribution: invoice or replacement cost, whichever is lower, to the distributor or vendor plus his cost of doing business. 17027. Forced, bankrupt or closeout sales invoices may not be used in calculating cost of doing business unless advertised as bought in stated quantity at forced or bankrupt sale. 17028. Ordinary channels: ordinary, regular and daily transactions leading to transfer of title. 17029. Cost of doing business or overhead expense: all costs, including without limitation labor, rent, interest, depreciation, selling cost, maintenance, delivery, credit, licenses, taxes, insurance and advertising. 17030. Loss leader (a) sold at less than cost to increase sales of other merchandise and (b) where misleads purchasers or prospective purchasers or (c) where diverts trade. 17031. Locality discrimintion: selling product at different prices in different geographic areas.

Article 3. Offenses. 17040. Creation of locality discrimination intended to destroy competition or prevent new competition is unlawful. 17041. Locality discrimination based on cost differences due to grade, quality or quantity or transport cost are legal. 17042. No prohibitions on: customer selection; functional classification of clients; functional price differences. 17043. Illegal to sell below cost or give away any article to destroy competition or injure competitors. 17044. Includes loss leaders. 17045. Secret or discriminatory rebates, refunds, allowances, commissions, unearned discounts in money or otherwise to injure competitors or to prevent or destroy competition are illegal. 17046. Coercion in effectuating violation is illegal. 17047. Solicitation of voilation is illegal. 17048. Collusion is illegal. 17049. Any locality discrimination or sales below cost in violation of spirit and intent of statute is illegal. 17050. Exceptions: close out or prevent loss; damaged or deteriorated goods with notice to public; court order; bona fide meeting of competitor's price by seller or manufacturer. Must keep such excepted stock separate and marked and advertising must show number of items. 17051. Contract violating these terms is invalid.

Article 4. Civil Liability. 17070. Person or trade association may enjoin violation or seek damages. 17071. Proof of locality discrimination or sales below cost and injurious effect is presumptive evidence of intent to destroy competition or injure competitors. 17072. Established cost survey by trade in particular area is competent evidence in proving costs of individual member. 17073. Proof of average over-all cost plus cost of production to producer or plus invoice or replacement (whichever lower) to distributor is presumptive evidence of average total cost. 17074. PUC tariffs are presumptive of delivery costs. 17075. Evidence of prevailing wage scale is admissible to show low wages lead to low prices to injury of competition. 17076. Services performed free or at less than cost shall be charged at prevailing rates in determining costs for actions hereunder. 17077. Raw material costs are also presumed to be prevailing average in community. 17078. Temporary restraining orders may be issued on application or upon hearing for issuance of preliminary injunction. 17079. Further restraints may be issued as necessary. 17080. Every article is covered by interim or final injunction. 17081. Plaintiffs need not file bonds for injunction. 17082. Need not prove actual or threatened damage or injury. But such damages may be claimed in seeking injunction. 17083. Depositions may be taken. Books and records may be subpoenaed. 17084. Inspection of books by plaintiff may be ordered and if refused, allegations of plaintiff are taken as fact. Immunity in other prosecutions. 17095. Agents are equally liable with principals. 17096. Need only prove unlawful intent of principal in action against agent. 17100. Fine of $100-1,000, imprisonment up to six months. 17101. Necessary only to prove intent of principal.

Appendix D. Part 9
California Alcoholic Beverage Control Act.

Sec. 55.5. Fair Trade Contracts: a. No contracts relevant to beverages branded by producer's or owner's brand and in competition with other similar beverages shall be illegal if they contain provisions for: (1) Resale price maintenance guarantee by buyer. (2) Resale price stipulations by producer or seller. b. Such contracts shall imply resale free of price terms for: (1) Closeout sales if notice is given and brand owner gets ten days advance opportunity to buy up stock. (2) Damaged or deteriorated beverages or containers with public notice of sale. (3) Sale by officer under court order. c. Willful or knowing sale at a price less than that stipulated in contract, whether or not seller is a party thereto, is unfair competition and is actionable at suit of any person damaged thereby. d. Not applicable to contracts between producers or between wholesalers or between retailers. Sec. 55.6 Fair Trades Contracts and Price Posting: Sec. 55.5 is applicable to containers, cartons, cases or bottles. All distilled spirits sold at retail shall be and other beverages may be sold under contract. No licensee may violate any provision of such contracts. Distilled spirits and brandy manufacturers, rectifiers and wholesalers shall file and maintain price lists showing prices at which spirits are sold. Sales must be made in compliance thereto.

Appendix D. Part 10
Mandatory Price Posting or Maintenance

Sec. 5565. Alcoholic Beverage Control Act: a. Can sell or resell only at prices required by: (1) effective posted price schedule; (2) effective fair trade contract. b. Exemptions: (1) Bulk--except where bottled by seller for purchaser; (2) Extra-state sale; (3) Inter-corporate sales among related corporations: (4) Sales to growers, rectifiers, consumers for on-premises consumption; (5) To other wholesalers where brand is not controlled; (6) To primary distributing agent who has posted scheduled prices. c. State may be divided into areas. For northern California and southern California areas, specified selling and resale prices; may have minima in net total area, but no lower than specified prices in northern California area. d. Fair trade contracts and posted prices: (1) Post price schedules if resale price not controlled by fair trade contract. Make fair trade contract, file resale price schedule if controls brand. Growers, wine rectifiers and rectifiers. (2) Wholesalers--post selling prices if controls brand or is primary distributing agent or if resale price not governed by fair trade contract; must file fair trade contract and post prices if he controls brand. (3) Extra-California sellers must designate California licensee to post prices to wholesalers and (4) Must designate one licensee handling imported wine to make fair trade contract and post prices. (5) Off-sale retailers controlling brand must post prices. e. Contents of schedules of selling and resale prices: (1) General: (a) Name, address of licensee; (b) Extra-California brand owner or seller for whom schedule is filed; (c) Date; (d) Trading area or areas covered; (e) Restrictions on distribution or resale; (2) Identifying information: (f) Brand name; (g) Secondary brand; (h) Form of labels; (i) Class, type of wine; (j) Vintage date if on label; (k) Special or gift package; (l) Number of bottles in case; (m) Size of bottles. (3) Prices by trading areas, (3A) Selling price schedules only: (n) Basic case posted price to wholesalers and retailers; (o) Basic price to retailers and consumers by the bottle. (3B) Resale price schedules only: (p) Basic case resale price to retailers; (q) Basic bottle resale price to retailers and consumers. (4) Discounts and charges: (r) Quantity discounts to retailers and consumers; (s) Prompt payment discounts to retailers, if any; (t) Broken case charge to retailers. Fair trade contracts must contain same schedule or information. f. Prices. Basic posted and basic resale price includes all legal charges other than California sales tax. Selling and resale price are basic selling and resale price less discounts plus broken case charge as in schedule. Price to retailers and consumers shall be as in effective fair trade contract. If bottles for buyer under bottler's label, price as in schedule for wine so labelled. Not more than three prices to same class of purchasers for wine differing in secondary brand name, form of label or other way not related to class, type, vintage date, package. g. Discounts in cash only and at terms specified in Act. h. Contracts and schedules must be filed by 10/15 to take effect by 11/1/49. Thereafter filed by 10th of any month. Monthly changes to be filed on or before 10th. May lower up to 20th of month to meet competition, but no lower. Must file changed contracts in same way. Effective first day of next month. i. Available for public inspection by 15th. j. Except for growers selling only to consumers at licensed premises where prices are posted -- must publish price schedules or changes therein by months or distribute by mail. k. Closeout sales or sales of damaged wines only by permit of Board, on conditions set out in Act. l. Below cost sale or price discrimination is prohibited. m. Circumvention is prohibited. Definitions: p. "Bottled" -- one gallon or less. "Class" and "type" -- as defined by U. S. Treasury or California Department of Health. Sec. 55.6. Distilled Spirits Fair Trade Contracts and Price Posting. All distilled spirits sold at retail shall and any other beverage may be sold under Sec. 55.5 with wine under 55.65. Sales of distilled spirits to retailers must be made in compliance with a filed price list.

Appendix D. Part 11.
Federal Market Control

The Agricultural Marketing Agreement Act of 1937, as amended, 7 U.S.C., 1940 ed., 601 et seq. (Sections relevant to fruits, nuts, vegetables and general crops.)

Policy declarations: Not intended for production control; intended to be effective regardless of validity of any part of other relief or adjustment legislation; intended to protect farm credit and farm purchasing power through achievement of orderly marketing in the public interest.

Objectives: To achieve parity prices as defined in AAA act of 1938, as amended, with base periods for tobacco and potatoes August 1919 - July 1929 and other commodities August 1909 - July 1929 if satisfactory 1909-1914 data are unobtainable; to protect consumers by approaching parity gradually and permitting no regulation intended to hold prices above parity; to establish and maintain minimum standards of quality and maturity.

Applicability: To individuals, partnerships, corporations, associations or other business units; areas within the United States and possessions with specified exceptions; to any trade within or which substantially burdens, obstructs or affects stream of interstate or foreign commerce; agreements are applicable to any commodity; orders are applicable to designated fruits, vegetables, nuts, milk and general crops, not for processing except for olives and asparagus and including both raisins and wine; to handlers only, except for milk; not applicable to entire production area if several regional orders are feasible with different terms for regions as necessary; orders apply to same persons in same way as agreement on which public hearings have been held; no prohibition, regulation or restriction of advertising may be applied.

Terms: Permitted: Agreements, not specified. Orders, in total or by classes, or time periods, providing methods for or: limiting quantity handled; alloting amounts acquired or handled by handlers on basis of past performance or current control; determining, equalizing and disposing of surplus; operating reserve pools; providing for inspection; special limitation and allotment procedures for hops. Mandatory, one or more: prohibition of unfair trade practices or unfair methods of competition; price filing; administration of order; other consistent and necessary terms.

Administration: Notice and public hearings on proposed order; findings by Secretary that proposal will tend to achieve goals of act; approval of agreement by handlers of 50 per cent of volume and of order by two thirds of producers or by producers of two thirds of volume, or over failure or refusal by handlers to approve agreement tending to prevent effectuation of goals of act and order is only feasible means thereto and is approved by producers of two thirds of volume. (Special provisions for approval in California citrus programs.) Enforcement through fine, civil suit or injunction in district courts and other remedies at law or equity. Appeal to Secretary and review in equity if sought. No prosecution of handler for acts during pendency of appeal in good faith. Prorated assessments for expenses deemed reasonable and likely to be incurred. Books and records disclosed to Secretary as necessary on confidential basis. Programs may operate in conjunction with state programs. Tariffs may be adjusted if imports interfere with program. Termination by Secretary or at end of season if favored by majority of producers.

Appendix D. Part 12.
Federal Order Regulating Shipments of Tokay Grapes.

Agreement #93. Order #51. Effective August 20, 1940. Amended August 24, 1941 and March 1, 1949. Previous program Agreement #11, License #9. All Tokay grapes produced in California. Two prorate districts. Regulates shipment to any point outside California. Base period, August 1919-July 1929.

Shippers Advisory Committee, three handlers shipping more than 250,000 packages in previous year, three other handlers and seventh member elected by other six together with Industry Committee for one year term to recommend regulations and advise Industry Committee. Seven producers, one each from specified areas chosen on basis of one vote per grower in one district only for one season term on Industry Committee to act as intermediary between the Secretary and the Industry; keep records; investigate production and marketing conditions and engage in research; furnish information requested by the Secretary; cause its books to be audited at least annually; select officers; select employees; give notice of meetings to Secretary; submit annual budget to the Secretary; redefine prorate or election districts if necessary with approval of Secretary; delegate limited authority to employees; establish committees or subcommittees; determine marketing policy after reference to stated factors; administer the terms of the Order; make and effectuate administrative rules and regulations; receive, investigate and report to Secretary complaints of violations; recommend amendments to the Secretary, five members for quorum or passing action.

Marketing policy report to the Secretary referring to estimated production by districts, general quality and size, possible or expected demand in various outlets, competing goods; expected recommendations for regulation. Industry Committee may recommend and Secretary effectuate limitation of shipments to particular grades and sizes by districts and to minimum standards of quality or maturity or both for the entire area in terms of shipping quality, edibility, appearance, maturity or any combination, including the data and analysis on which the recommendations rest. Federal-State Inspection Service certification is required. If grower is required to eliminate more than average percentage for district or area through no fault of own, he may petition for permission to ship sufficient volume meeting minimum standards but not meeting particular limitation in order to equalize his and the average percentage of elimination.

When Industry Committee finds supply will be irregular and grade-size limitation is inadequate, it may recommend retention of cars at assembly points, regulation of loading or packaging or limitation of shipments by trucks, specifying the regulation period, expects average daily and daily maximum shipments, daily advisable shipments. Cars may be held at either rail or cold storage points. Alternative methods for release from assembly points are specified.

No car may be held more than seventy-two hours. No limitation of loading to zero may exceed forty-eight hours. In such periods, truck shipments may be limited to grapes previously packaged and with permit. Overshipments and undershipments may be made up on the next day. Detailed reports and records are required. Relief and charity shipments are exempted.

Appendix D. Part 13.
Order regulating handling of raisins produced from raisin variety grapes grown in California

Agreement #109, Order #89, effective August 18, 1949. No amendments. Regulates any handling outside of California, although the Secretary has found that all handling is either in or directly burdens, obstructs or affects the flow of interstate or foreign commerce.

The Raisin Advisory Board is constituted of thirty-six producers from fifteen election districts, seven packers distributed among cooperative and commercial enterprises and varying by volume of business for staggered terms of three years. This Board nominates members of the Administrative Committee; advises it with respect to marketing policy; surplus and reserve percentages; and other matters on request. The Raisin Administrative Committee is comprised of eight producers including one producer of varieties used in Golden Bleach raisins, four packers distributed by volume and by commercial or co-operative affiliation, one dehydrator and one processor, for one year terms. Quorum is nine and passing vote is majority of members present.

The annual marketing policy must be adopted prior to July 5 and filed with recommendations to the Secretary by July 15. Meetings are open and policy statements must be distributed to all affected persons. Regulations may differ by variety. Recommended free, reserve and surplus tonnage -- based on analyses of supply, including carry-over; trade demand; current prices; trend and level of consumer income; price trends; and other pertinent factors -- submitted to Secretary by July 15 with verbatim record of discussions at open meeting after public notice.

Free tonnage may be handled without restriction except for record keeping. Reserve and surplus tonnage must be held at all times by handler in storage under specified conditions to account of Committee until relieved by delivery to Committee or otherwise. Deferred withholding of reserve and surplus storage to November 15 by posting bond to the value of deferred obligation or by other methods as prescribed. Minimum grade requirements may be set out separately for reserve and surplus tonnage by variety and by natural condition or packed raisins. If reserve or surplus tonnages are sold, each handler may buy prorated amount determined by his reserve or surplus obligation as fraction of total. Payments for handling reserve and surplus tonnage as set by Committee. Reserve and surplus tonnage may be pledged by Committee for loans. Advance and other payments made out of loan to handlers on basis of surplus or reserve obligations by variety. Reserve tonnage may be sold to handlers by Committee after specified dates on basis of prices approved by Secretary and not less than average price on free tonnage by variety to date of sale. Reserve tonnage unsold by June 1 becomes surplus tonnage. Committee may dispose of surplus tonnage so as not to interfere with commercial channels and must dispose of it by specified dates. Natural Muscat or Valencia raisins may be substituted for Layer Muscat surplus obligation. Regulations for handling damaged raisins shall be set out each year.

Reports must be made as follows: Natural condition and packed raisins by varieties and locations held as of July 1 or on request of Committee. Weekly report by varieties from handlers showing: acquisitions; reserve and surplus obligations; locations of such tonnage; cumulative totals. On request, names and addresses of persons from whom raisins acquired or other information as needed. Records must be kept as required. Inspection for verification of reports and records is authorized.

Appendix D. Part 14
Agricultural Act of 1949

Public Law 439. Ch. 792. 81st Congress. 1st Session. H.R. 5345

Title I--Basic Agricultural Commodities. 101. Secretary is authorized and directed to support prices to cooperators who have not disapproved marketing quotas as follows: a. Tobacco, corn, wheat, rice. b. Cotton, peanuts. c. For tobacco, support at 90 per cent if marketing quotas in effect. d. (1) If producers have not disapproved marketing quotas, support at not less than 90 per cent in 1950 if marketing quotas or acreage allotments are in effect. (2) Support at not less than 80 per cent for 1951 crop. (3) Support at 50 per cent if marketing quotas are disapproved except for tobacco for which no support. (4) Support to corn cooperators outside commercial area at 75 per cent of commercial area support. (5) Price support may be made available to noncooperators but not at higher levels than received by cooperators. e. Section 2, act of 7/28/45 (59 Stat 506) is in effect.

Title II--Designated Nonbasic Agricultural Commodities. 201. Without regard to Title III, the Secretary may and must support wool (including mohair), tung nuts, honey, Irish potatoes, milk, butterfat and products of milk and butterfat as follows: a. Wool (including mohair) through loans, purchases or other operations, between 60 per cent and 90 per cent, to encourage yearly output of about 360 million pounds of shorn wool. b. By same means, 60 per cent to 90 per cent for tung nuts, honey and Irish potatoes. c. Whole milk, butterfat and their products between 75 per cent and 90 per cent as necessary to obtain adequate supply through loans on or purchases of products of milk or butterfat.

Title III--Other Nonbasic Agricultural Commodities. 301. Through loans, purchases or other operations the Secretary may support other commodities at not more than 90 per cent. 302. Without restricting to such commodities, support shall go to producers of storable nonbasics with agreement, order or quota programs at not more than 90 per cent or less than minima indicated on price-supply schedule in figure 1, or less if mandatory supports require funds or reference to 401(b) standards makes lower minima desirable.

Title IV--Miscellaneous. 401. a. Secretary shall use CCC or other means available. b. Amounts, terms, conditions and extent to which operations are carried out are determined by the Secretary. Must consider in deciding on support or level thereof: (1) supply versus demand; (2) price supports on other goods and feed value equivalents of feed grains in terms of corn; (3) availability of funds; (4) perishability; (5) importance; (6) ability to dispose of stocks; (7) loss of exports; (8) ability and willingness of producers to keep supplies in line with demand. c. Compliance with acreage allotments, production goals and marketing practices may be required. d. Support price is based on parity at beginning of marketing year or season for products so marketed and as of January 1 for others. 402. After notice, hearings and findings of necessity to alleviate or prevent shortage in public interest or national security, scheduled maxima may be exceeded. 403. Grade, type, staple, quality, location and other factor adjustments in support as necessary to make national average price as defined in act. 404. The Secretary may use CCC services and facilities including contract procurement for Section 32 and for Section 6. School lunch programs. May make advance payments to CCC. 405. No recourse against producers for loan value deficiencies unless fraud. Recourse exists for deficiencies in grade, quality, quantity stored on farm or delivered, failure properly to preserve or care for or failure or refusal properly to deliver. 406. Insofar as practicable, supports for field crops shall be announced prior to planting and for others prior to marketing season or January 1 for products not marketed on season, with support level not exceeding estimated legal maximum and not reduced if legal maximum exceeds announced support. 407. CCC must deter shifting of inventory burden to it. Cannot sell stocks at less than 5 per cent plus reasonable carrying costs over current support, except for: a. new or by-products uses; b. peanuts and oilseeds for oil; c. seed or feed if no substantial damage to program; d. waste or deterioration threat; e. sales to establish basis for claim of fraud; f. export; g. wool; h. other than primary uses. 408. a. Commodity is storable if commercially stored or can be stored over time required by support operations. b. Cooperator--basic: acreage not knowingly in excess of allotment under Title III of AAA or for corn outside commercial area in compliance with eligibility conditions set by Secretary. c. Basic: corn, cotton, peanuts, rice, tobacco, wheat. d. Nonbasic: all others. e. Supply percentage: available supply divided by normal supply at beginning of marketing season from latest data by Secretary. f. Total supply of nonbasics: carry-over at beginning of market year plus estimated production during calendar year plus estimated imports. g. Carry-over, nonbasics: quantity on hand in U. S. at beginning of marketing year not including production in current calendar year including processed supplies if found necessary by Secretary. h. Normal supply nonbasic: (1) estimated domestic consumption plus (2) estimated exports plus (3) allowance for carry-over equal to average carry-over in preceding five years adjusted for abnormal conditions, changes in marketing conditions or operation of program, current trends in consumption as deemed necessary by Secretary. i. Marketing year--set by Secretary to include time when substantially all of crop is marketed. j. Any term in AAA of 1938 has same meaning here. 409. a. "Prices" in "adjusted base price" of 301(a)(1)(B) of AAA of 1938 as set by Agricultural Act of 1948 includes subsidy payments under Emergency Price Control Act of 1942. b. "Parity index" in same now includes wages paid hired farm labor. c. For 1950, no parity price for basics may be lower than as computed by old formula. 411. Section 32, AAA of 1935--funds shall be used mainly for perishable nonbasics other than those in Title II of 1948 act. 412. Determinations by the Secretary not inconsistent with the CCC Charter Act are final and conclusive. 416. To prevent waste, stored products may be used by Munitions Board or other federal agency on terms in public interest to pay for products not produced in the United States. Products not so used may be made available at storage point at no cost other than delivery on order to: school lunch, Indian affairs, federal, state and local public welfare agencies; second, private agencies for United States relief; third, private agencies for non-United States relief. 417. Banks for Cooperatives may lend up to 80 per cent for new storage construction if CCC will lease new structures up to 75 per cent for three years and additions up to 75 per cent for two years. The Central Bank for Cooperatives may lend on same terms. Sections 418-419 deal with rice.

Appendix D, Part 15

Raisin Purchases and Disposition by U. S. Department of Agriculture Agencies, Quantity and Expenditure, Fiscal Years 1935-36 - 1948-49

Fiscal year (July 1-June 30)	Agency	Purchases		Disposition		
		Quantity, processed weight tons	Expenditure dollars	Quantity, processed weight tons	Expenditure dollars	Outlet
1935-36	FSCC	6,224	97,693	6,224	97,693	Substandard diversion
1936-37	--	0	0	--	--	
1937-38	FSCC	15,000	1,190,437a/	--	--	Relief purchases
1938-39	FSCC	10,100	946,814a/	--	--	Relief purchases
1939-40	FSCC	74,862	5,313,535a/	73,138	5,103,035	Relief purchases
				1,349	209,000	Food stamp plan
				375	1,500	Red Cross exports
1940-41	SMA	20,582	1,117,308a/b/	14,100		General commodity purchases
				413		Red Cross exports
				6,069		Food stamp plan
1941-42c/	AMA	62,817c/	4,967,875c/	51,729d/		Lend lease
				4,283	781,000e/	Food stamp plan
1942-43	FDA	87,289	13,952,733f/	30,811g/		Lend lease
1943-44	OD	87,916	19,415,232f/	105,242		Lend lease
				12,553h/		Cash sales
				160h/		Hawaii program
1944-45	CCC	71,496	18,196,284f/	73,072		Lend lease
				388		Hawaii
				7,169		Cash sales
				12		UNRRA
1945-46	PMA	2,470	616,144f/	7,893		Foreign shipments
				51		UNRRA
				2,282		Cash sales including price-support program
1946-47	--			267		Foreign shipments
1947-48	CCC	118,077i/	18,992,795	7,205		School lunch, institutional feeding
1948-49	CCC	59,030	9,537,665	49,693	3,361,934	Price-support program
				4,427	181,839	ECA (Sec. 32 funds)
				4,483	697,332	Exports (Sec. 32 funds)
						School lunch (Sec. 32)

(Continued on next page.)

a/ Includes transportation, processing, and other handling charges.

b/ Does not include expenditures under Food Stamp Plan.

c/ For period March 15, 1941 to June 30, 1942; includes 38,470 tons natural condition raisins valued at $2,690,128.

d/ For period April 29, 1941 to June 30, 1942.

e/ For period July 1941 to December 1941 only; quantity and value purchased with blue stamp by participants in Stamp Plan.

f/ F.O.B. cost.

g/ Lend-lease shipments for calendar year 1942 amounted to 41,993 tons. Agricultural Statistics, 1943. p. 523.

h/ For period January to June 1944 only. "Cash sales" include deliveries to armed forces, American Red Cross, Veterans Administration, War Surplus Administration, foreign relief programs, direct distribution to United States civilian groups, such as school lunch, relief agencies, under Sec. 32 funds.

i/ Includes price-support program and general supply program. (Sales to armed forces, individuals and corporations to prevent spoilage, Economic Cooperation Administration, foreign governments for cash. 126,400 tons were contracted for but 8,324 tons were cancelled. Army bought about 2,300 tons, making total purchases 120,377 tons.)

Sources of data: Compiled by Giannini Foundation of Agricultural Economics, Univ. of Calif., April 1950.
1935-36: Agricultural Statistics, 1942. p. 811.
1937-38 and 1938-39: Annual Reports, FSCC.
1939-40: Report of Administrative Officer in Charge, Surplus Removal and Marketing Agreements, 1940, tables 1, 3, 7, and 9.
1940-41: Report of Administrator, SMA, 1941, table 1; volume data on file with W. Allmendinger, P.M.A., Fruit and Vegetable Branch.
1941-42: U. S. Department of Agriculture, AMA, Monthly purchase reports (mimeo.), March 1942, August 1942. SMA, Economic Analysis Division, "Purchases of Foods Under Food Stamp Plan and Direct Distribution of Foods" (mimeo.), 1941-42.
1942-43 - 1948-49: Purchases: Monthly purchase reports (mimeo.) issued by W.F.A. (F.D.A., O.D., C.C.C.), PMA; also 1947-48 and 1948-49 purchases from W. Allmendinger, PMA, Fruit and Vegetable Branch.
1942-43 - 1944-45: Disposition: Monthly reports of agricultural commodities delivered at shipside for export under Lend-Lease Act (mimeo.), issued by A.M.A., W.F.A., (F.D.A., O.D., C.C.C.).
1945-46 - 1946-47: Disposition: P.M.A., monthly delivery reports (mimeo.).
1948-49: Disposition: P.M.A., Report of Fruit and Vegetable Branch, Fiscal 1949 (Aug. 1949), Table VIII.

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